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**Standing Committee
for Economic and Commercial Cooperation
of the Organization of Islamic Cooperation (COMCEC)**

COMCEC TOURISM OUTLOOK 2019

**COMCEC COORDINATION OFFICE
September 2019**

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Preface

The COMCEC Strategy, adopted during the 4th Extraordinary Islamic Summit held in Makkah Al-Mukarramah on 14-15 August 2012, envisages Working Group Meetings as one of the main instruments for its implementation. Through the Working Groups, country experts get the chance of elaborating the issues thoroughly in the respective cooperation areas and sharing their good practices and experience. The Working Groups are established for each cooperation area defined by the Strategy, namely Trade, Transport and Communication, Tourism, Agriculture, Poverty Alleviation, and Finance.

The COMCEC Outlooks are prepared in each cooperation area of the Strategy with a view to exploring the global trends and current situation in the OIC Member Countries in the respective area and enriching the discussions during the Working Groups Meetings by providing up-to-date data.

The COMCEC Tourism Outlook 2019 is prepared by Dr. Gurel CETIN, consultant at the COMCEC Coordination Office, with the objective of providing general information on the status of tourism in the Member States. It dwells on the major issues with regards to tourism sector development in the light of international tourism trends, provides insights on the current status of the OIC Member States and makes comparative analyses with the different country groupings to demonstrate the situation in the Member States and thus the cooperation potential.

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1 Introduction

Tourism industry has experienced continued expansion and diversification, becoming one of the most rapidly developing industries in the world. Transformed from an activity of privileged travelers only some decades ago, tourism today enables more than one billion people to move across international borders each year. Globalization of goods and services, increased leisure time, the technological and transport revolutions, relaxation in visa procedures, and rising middle class have positioned tourism as a major growth tool. Because of the geographical expansion, competition between the tourist-receiving countries has been intensifying to obtain the highest share from the expanding international tourism market as a result of the enhanced transportation facilities and additional income allocated to travel expenses, in line with the improving welfare.

Tourism has continued to be a critical sector in both advanced and developing economies for economic development, poverty alleviation and sustaining employment. Growth of the tourism industry also contributes to employment, raises national income, and support balance of payments. In this regard, tourism sector is an important driver of growth and prosperity and can play a leading role in reducing poverty particularly in developing countries and the Least Developed Countries (LDCs).

As a trade in services category, tourism ranks fourth after fuels, chemicals and food products. As a major source of foreign exchange and investment, tourism also creates much needed employment and investment opportunities. Tourism's unparalleled cross-cutting nature and multiple links to the other economic sectors, further positions it as an efficient multiplier in global development strategies. Hence, there is a substantial emphasis on developing and facilitating the tourism industry within the Organization of Islamic Cooperation (OIC). COMCEC Economic Summit held in 2009 has defined the tourism as one of the three priority sectors together with agriculture and transportation. In addition to this, tourism sector is identified by the COMCEC Strategy as one of the six cooperation areas (among trade, transportation, agriculture, poverty alleviation, and finance).

This 2019 Outlook aims to provide a brief account of the situation in the OIC Member Countries. In this respect, the major issues with regards to development of tourism industry in the light of international tourism trends, the current situation in the member countries and some comparisons regarding competitiveness of the OIC Member States were analyzed.

2 The Importance of Tourism for Development

A strong tourism sector contributes in many ways to development and the economy. It makes both direct contributions, by raising the national income and improving the balance of payments, and indirect contributions, via its multiplier effect and by providing the basis for connecting countries, through hard and soft infrastructure attributes that are also critical for a country's general economic competitiveness, international trade and foreign direct investment.

Over the past decades, many new destinations have emerged, challenging the traditional ones in Europe and North America. For many developing countries, tourism is one of the main sources of foreign exchange income and the number one export category, creating much needed employment and opportunities for development. The main positive economic impacts of tourism relate to foreign exchange earnings, contributions to government revenues, generation of employment and investment opportunities. Local recruitment and business opportunities in tourism help reduce rural-urban migration. While fostering gender equality, entry level jobs in tourism require less skilled workforce and this also enhances recruitment opportunities among younger generations and disadvantaged groups.

Based on the information from countries with data available, the World Travel & Tourism Council (WTTC) estimated that travel & tourism's contribution directly to worldwide gross domestic product (GDP) was 10 % in 2018 and is expected to rise by 4% in 2019. The forecasted growth of tourism's contribution to GDP is around 3.7% on the average for the next ten years to 12% of GDP in 2029. This is much faster than the growth in global economy which was around 3.2% in 2018. With direct and indirect effects of more than 185 supply-side economic activities that have significant connections to tourism, its total contribution to GDP is calculated as 10.4%, a total of US\$8.8 trillion, and is expected to grow by 4 to US\$9.2 trillion in 2019. It is also estimated that travel and tourism sector have attracted capital investment of US\$941 billion in 2017 (WTTC, 2019a).

Tourism provided 123 million direct (3.8% of total employment) and 196 million indirect and induced jobs with a total of 319 million (10% of total employment) jobs in 2018 and direct contribution to employment is expected to rise by 2.9% in 2019. Since tourism affects transportation, hotels and lodging, food & beverage, cultural and entertainment industries, banking & finance, promotion and publicity services; tourism's contribution to employment tends to be much higher. In 2018, nearly 319 million jobs were supported in tourism related industries (WTTC, 2019a). Tourism's contribution is estimated as 10% of the overall number of jobs or one in 10 jobs globally (UNWTO, 2019a). According to the WTTC, travel & tourism will support 421 million jobs which indicates 12% of total employment by 2029 (WTTC, 2019a).

Figure 2.1 Why Tourism Matters?

Source: UNWTO, Tourism Highlights 2016 Edition.

According to the UNWTO, total exports earnings (including passenger transport) generated by international tourism in 2018 reached US\$ 1.7 trillion or US\$ 5 billion a day on average. International tourism represents 7% of the world's exports in goods and services, up from 6% in 2015, as tourism has grown faster than world trade over the past four years. Tourism exports account for as much as 29% of the world's exports of commercial services. Globally, tourism ranks third after fuels and chemicals and ahead of food and automotive products as an export category. However, in many emerging economies, tourism is the largest export category. While tourism represents 30% of services exports globally, the industry has 40% share in emerging economies' services exports (UNWTO, 2017a). Tourism is also important for export diversification; particularly for commodity and oil exporting countries tourism has the potential to offset weaker export revenues.

In over 150 countries, tourism is one of the top five foreign exchange earners and in 60 countries it is the number one source of foreign currency income. In 23 of the 49 Least Developed Countries, international tourism is among the top three foreign exchange earners, and for 7 LDCs, it is their single largest revenue earner (UNWTO, 2012b).

It is acknowledged that tourism contributes in alleviating poverty and empowering women, youth and migrant workers and provides new employment opportunities. There are three main pathways through which tourism affects poverty reduction. Firstly, the wages and earnings of workers or entrepreneurs who participate in the sector can be regarded as direct effects of tourism. Tourism is more labor intensive than other sectors, and uses a relatively high proportion of unskilled or semi-skilled labor. For advanced, diversified economies, the contribution of tourism to GDP ranges from approximately 2% for countries where tourism is a comparatively small sector, to over 10% for countries where tourism is an important sector of the economy. For small islands and developing countries, the weight of tourism can be even larger, accounting for up to 25% in some destinations like in some Member Countries as Maldives. Secondly, indirect effects occur through the tourism value chain which includes inputs like food and beverage, construction, transportation, furniture and many other sectors. Evidence suggests that in developing countries, the inter-sectoral impact adds an extra 60-70 % on top of the direct effects of tourism. Finally, dynamic effects of tourism occur on the livelihood strategies of local households, the business climate for small enterprise growth or infrastructure development in countries. Moreover, tourism tends to employ more women and young people than other industries and enhance their economic welfare (Ashley, et al., 2007).

A cross country study by the IMF showed that an increase of one standard deviation in tourism activity would lead to an additional annual growth of about 0.5 percentage point per year, *ceteris paribus* (everything else being constant) (IMF, 2009). Thus, particularly low income economies should view investing in its tourism industry as a means to stimulate growth over the long term and enabling the poor to share in economic gains.

3 Overview of International Tourism in the World

Key Tourism Trends in the World

The last six decades have witnessed extraordinary growth in international tourism volume. In spite of the multiple challenges and shocks –from human induced crises, to natural disasters; tourism, although affected, has always bounced back, proving its resilience and capacity to recover. During the next two decades tourism is expected to sustain its growth. International tourist arrivals are estimated to increase on average by 43 million annually between 2010 and 2030 (Tourism Towards 2030, 2012).

The share of emerging economies in the international tourism market is increasing. This increase will be slightly higher than the rate achieved in the period 1995-2010. For the decade 2010-2020, increases will be more moderate in the first years and pick up in the middle of the period, and they will gradually slowdown. Over time, the rate of growth is expected to decrease gradually, from 3.7% in 2014 to 2.5% in 2030. This is the result of a combination of four factors (Tourism Towards 2030, 2012):

- The base volumes are higher, so smaller increases still add substantial numbers;
- Lower GDP growth, as economies mature;
- A lower elasticity of travel to GDP;
- Increasing transport costs.

Future arrivals will be spread wider across the globe and travel between regions will continue to grow slightly faster than travel within the same region. The share of emerging economies in the international tourism will surpass the share of advanced ones. Many of the new arrivals will be to destinations in Asia, Latin America, Central and Eastern Europe, Africa and the Middle East. The future brings enormous opportunities for tourism to take a central role in the political and economic agenda, seeking recognition for its contribution to economic growth and development. It also brings added challenges and responsibilities for tourism sector to take the lead in mitigating its potential negative impacts on host communities and the environment (Tourism Towards 2030, 2012).

Over the past six decades tourism has experienced a continued growth not only in traditional destinations in Europe and North America but also in other parts of the world. According to Tourism Towards 2030; by 2030, 58% of international arrivals will be recorded in the emerging economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa. Asia and the Pacific will gain most of the new arrivals. South Asia will be the sub-region with the fastest growth in international arrivals. North-East Asia will be the most visited sub-region by 2030. With the advancements in aviation technology and open skies agreements; air transport industry has substantially reduced travel time and travel costs for long haul travel (Cetin et al., 2016). Air transport will continue to increase its market share, but at a much slower pace. The cost of air transport will cease declining, and is expected to grow at an average annual rate of 1.1% per year from 2010 to 2030 (Tourism Towards 2030, 2012).

Conclusions with respect to the consumer profile and the trends of the next 20 years reached by assessing results of various studies conducted by the World Tourism Organization can be summed up as follows:

- Long-haul travel and overseas travel will increase and new destinations in relevant regions will gain importance.
- Electronic media (interactive maps, Internet, web sites, etc.) will be increasingly more important for choosing destinations and making reservations.
- In line with the increasing education and welfare level of individuals, the number of experienced traveler groups will increase.
- Concerns about safety and security will remain an important issue driving demand.
- Preferences of tourists will become diverse and demand for innovation and variety will rise; the emphasis will be on comfort and adventure. For product development, 3S (i.e., sun-sand-sea) will be replaced by 3E (i.e., excitement-education-entertainment).
- In parallel with an increase in average human life expectancy, retirement period will be longer and people will have more time for vacation.
- Singles, and couples without children, and 65+ ("the third age") groups are anticipated to constitute the larger percentage of the world population with more resource allocated to travel and entertainment. By the year 2030, the fastest increases are in those 65 and older group, which will see a jump in developing countries by 140 percent. By 2040, the global population is projected to reach 1.3 billion and older people accounting for 14 percent of the total (Hammond, 2011).
- Average working time will decrease and people will have more time for vacation.
- Consumers will be informed and protected within the framework of universal systems, and the influence of campaigns addressed to consumers for a sustainable and balanced development of tourism will be stronger.
- Maintaining the destinations tourism development and preventing overtourism will be a priority.
- Destination management will be decentralized and will be based on travel motivations rather than geographical regions.

Horwart HTL (2015) has also identified 10 global trends which will influence mid- and long-term tourism development. Among these, first five of trends will have a major influence on demand in the tourism sector but will also impact the second set of trends, which concerns changing supply. Together, they represent forces which will shape the future of tourism.

According to this report, global population is aging and as a result *silver hair tourists'* segment is emerging -- with specific desires and needs in terms of customization, service consumption, security and desired products. The share of world's population over the age of 60 increased from 8% in 1950 to 17% in 2017. According to forecasts, this segment's share will reach 22% by 2050. Silver hair tourists are an important tourist segment and are expected to spend more than all other age groups on travels with a satisfactory disposable income, less home responsibilities and empty nests, more time to travel and relatively good health. They require tailor-made services and prefer to build trust through face-to-face interaction with providers. They also have different preferences and interests, expectations and needs, and their focus is often based on

special interest. Health and wellness travel is popular among silver hair tourists (Horwart HTL,2015; UN, 2017).

Figure 3.1 Tourism Megatrends



Source: Horwath HTL, 2015

In addition to aging population, generation Y (also known as Millennials) and generation Z, (known as iGen) are also an important market for tourism sector. These generations are technology driven age groups. Among these, millennials are expected to represent 50% of all travelers by 2025 and before that the entire tourism value chain is being adjusted to meet their lifestyle requirements. To meet their needs, tourism services will be more transparent and tech savvy, with a strong focus on empathy and customer connection. On the other hand, generation Z is believed to be totally different from generation Y in so much as they already have higher access to information, a more dynamic lifestyle, and a higher level of education, an accelerated adoption of change and faster spending (Horwart HTL,2015).

The increase in average income and the fall in levels of absolute poverty are resulting in a growing middle class. It is expected that the middle class will increase from 1.8 billion in 2009 to 3.2 billion by 2020 and 4.9 billion by 2030. Most of this growth is expected from Asia-Pacific and this segment's characteristics and needs will have a growing importance and impact on the tourism products and services (Horwart HTL,2015).

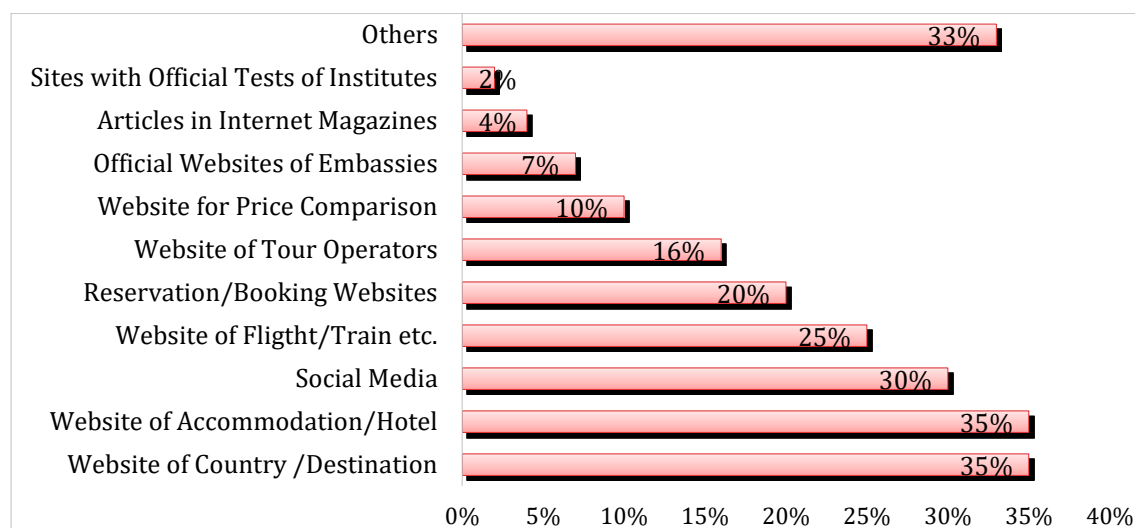
The weight of emerging destinations in the international tourism market is increasing. According to UNWTO; by 2030, 58% of international arrivals will be to the emerging destinations.

Governments around the world are facing numerous political, social, economic and environmental issues that might influence tourism destinations. Political tensions, terrorism and civil riots impose various threats to the future of tourism in any destination. According to a research by WTTC, the impact of these crises on tourism and the length of time needed to return to previous levels differ widely depending on the type of crisis and other diverse factors. Whether tourists are directly targeted or affected, which locations are involved, the extent of

infrastructural damage, the time of the year, as well as the scale and tone of media coverage are the factors that affect the scale of their impact of such crises on tourism. In contrast to popular opinion, terrorism does not have the most enduring impact, however political turmoil has a much more gradual impact, often lasts for a long time and is difficult to judge when it is over. To be successful, it is clear that crisis management strategies and tools are becoming a necessity for all tourism stakeholders. Five-point crisis communications plan should cover clear information, consistency, openness and accessibility and sympathy for victims. Governments and authorities should also ensure clear and effective communications (ITB, 2015).

Among supply side trends, tourism is strongly influenced by the progress of the technological revolution. The Internet has already changed the way tourists search, book and experience their travel. The whole industry has to adopt new technology trends and reshape the way they provide services. 75% of international travelers use online information sources to plan their trip. As displayed on figure 3.2 around 30% of these 'online' international travelers actively use social media when researching about their trip (ITB, 2015) besides the official web sites of destinations and service providers.

Figure 3.2 Internet Information Sources



Source: ITB World Travel Trends Report 2015-2016

International travelers focus on the most relevant social media for travel information rather than the biggest social media platforms. Review sites, travel blogs and travel forums are used much more intensively than generic social networks.

Loyalty within tourism sector is expected to decline in future. There will be less complicated sign-up forms. Physical loyalty cards and loyalty programs now have to be integrated into the tourist experience. These programs are expected to customize tourist services rather than offering only discounts and upgrades.

Health and healthy lifestyle will become increasingly important in tourists' decision making and tourism sector will offer products and services according to traveler's health and healthy lifestyle needs.

The sharing economy has shown incremental growth in recent years and is forecast to reach USD 335 billion by 2025, according to projections. Tourism is one of the sectors that much of this growth occurred, as the fast paced growth of peer-to-peer and shared usage platforms is changing the tourism marketplace and giving people new options for where to stay, what to do and how to get around. Sharing economy platforms have adopted different business models, some of which closely resemble traditional tourism activities, while others appeal to users' sense of community (OECD, 2016).

This rapid growth of the sharing economy is placing pressure on existing tourism policy frameworks. This requires a balanced, informed approach, which considers all interests. Tourist protection, safety and quality assurance frameworks are important factors to translate to the sharing economy model. Taxing and regulation of sharing economy and impact on residents are other challenges to be dealt by legislative bodies. Governments should make sure that they capture the opportunity to stimulate innovation and support the development of tourism, while addressing the challenges it poses for the traditional tourism sector and the impacts on society (OECD, 2016).

Governments are recommended to modernize policy and regulatory approaches, re-think policy incentives, better understand the policy environment and test new approaches, utilize the data, strengthen data collection and research on the impacts of the sharing economy on tourism and local communities (OECD, 2016). Increased local planning, management and marketing of destination and regional leadership and institutionalization in tourism through DMOs at destination level also emerge as a necessity (Edgell, 2015).

Economic, social and environmental costs and benefits have to be balanced in order to ensure the long-term sustainable development of tourism. Sustainable tourism development requires the participation of all relevant stakeholders at the destination level including and engaging particularly the locals.

International Tourist Arrivals

According to the UNWTO (2019a), international tourist arrivals grew by 5% in 2018, and reached 1.4 billion tourists. 1.4 billion was the 2020 target and thus realized two years in advance. Despite occasional shocks, international tourist arrivals have shown virtually uninterrupted growth – from 277 million in 1980 to 529 million in 1995 and 1.4 billion in 2018 (UNWTO, 2019a). 2018 was the seventh consecutive year of above-average growth (more than 4%) in international tourism following the 2009 global economic crisis. Despite ongoing geopolitical, economic and environmental challenges in various regions of the world, demand continued to be strong in most of the destinations.

Tourism flows were influenced by threesome major factors in 2017 and 2018. These were Fluctuations in exchange rates, trade wars between US and tariffs including China, Brexit and US & China trade conflicts, decline in interest rates, the price of oil and other commodities which increased disposable income in importing countries but weakened demand in exporting countries; and increased global concern about safety and security in some destinations are some of the major factors affecting tourism flows (UNWTO, 2018a).

The strong momentum in growth is expected to continue in 2019 based on 2018 and is expected to be 4-5%, above the UNWTO's long term projections (for 2030: +3.8% a year on average between 2010 and 2020). International tourist arrivals already grew by 5% between January and August 2019, compared to same period of last year. UNWTO forecasts international tourist arrivals to increase by 4% to 5% over the full year 2019 (UNWTO, 2019a). Arrivals to Europe is expected to rise by 3-4%, Americas by 2-3%, Asia and the Pacific by 5-6%, Africa by 3-5% and Middle East by 4-6% in 2019.

Table 3.1 International Tourism Arrivals and Tourism Receipts

	2000	2005	2010	2015	2017	2018
Number of tourists (millions of people)	674	809	953	1.189	1.322	1.401
Annual change (percent)	8,1	5,9	6,5	4,5	7	5,4
Tourism receipts (billion dollars)	495	701	961	1.196	1332	1451
Annual change (percent)	-	-	11,7	-4,5	5	4,4

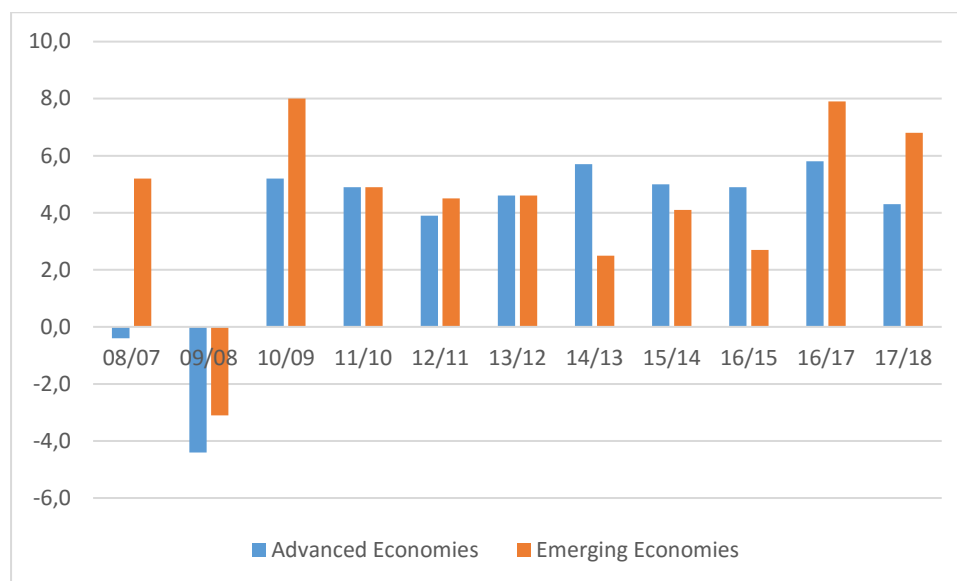
Source: World Tourism Organization

International tourism market has become characterized by wide geographical distribution and continuous diversification of destinations. New destinations have been emerging in the developing regions of Asia-Pacific, the Middle East and Africa and this rapid expansion of new markets has increased the competition in the tourism sector.

While many destinations recorded an overall growth, results are more mixed than usual across destinations. According to the UNWTO, growth rate in advanced economies (+4.3%) were below the advanced economies (+6.8%), with Asia and the Pacific (+7,3%) and Africa (+7%) showing the strongest results in 2018. In 2018, international tourist arrivals to advanced economies were 762 million, while it was 639 million for emerging economies.

In 2018, increasing GDP (3,6%), low interest rates, stable fuel prices, lower flights fares and enlarging flight network, and enhanced visa facilitation has supported tourism growth.

As displayed on Figure 3.3, the growth of international tourist arrivals in emerging economies is greater than advanced economies for the years 2007-2012. However, since 2013, advanced economy destinations showed relatively faster growth in tourist arrivals than emerging economy destinations up until 2017. In 2017 and 2018 emerging destinations performed well with 8% and 7% growth respectively, while advanced economy destinations grew by 6% and 4%.

Figure 3.3 Change in International Tourist Arrivals (%)

Source: World Tourism Organization, Tourism Barometer 2017 July & Tourism Highlights 2017

In terms of regions, the UNWTO reports that Asia & Pacific and Africa (+7%) were the best performers in 2018. Asia Pacific captured 25% of arrival and 30% of receipts with 348 million international tourists. Growing purchasing power, relative safety, increased air connectivity, more affordable travel and visa relaxation arrangements were major reasons of the growth. In Africa Tunisia continued its recovery while Morocco and Mauritius grew at robust rates. International arrivals to Africa totaled 67 million in 2018.

Table 3.2 International Tourism Arrivals by Region (Millions)

Tourist Arrivals	2000	2010	2015	2017	2018	Share (%)
World	674	949	1.186	1.329	1.401	100
Europe	386.4	488.7	607.6	673	710	51
Asia&Pacific	110.3	205.4	279.2	324	348	25
Americas	128.2	150.1	192.6	211	216	15
Africa	26.2	49.7	53.5	63	67	5
Middle East	22.4	54.8	53.3	58	61	4

Source: World Tourism Organization, 2019a

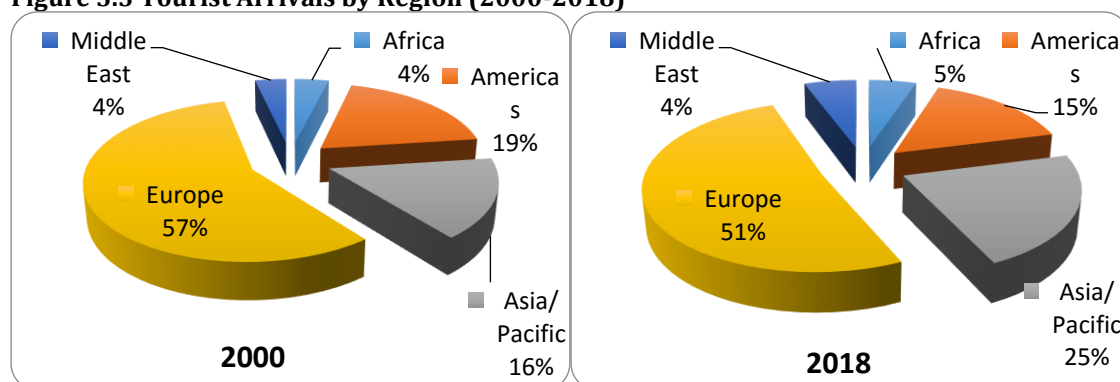
According to the Table 3.2, Europe (+5,5%), Asia and the Pacific (+7,3%), the Americas (+2,3%), Africa (+7%), and Middle East (4,7%) all enjoyed growth.

In 2018, Europe (+6%) hosted half of the international tourists (710 million). This is an increase of 39 million from 2017. Receipts also increased by 5% and reached 570 billion USD. Turkey continued strong recovery with Italy, Russia, Greece, Portugal and Croatia in 2018. Yet, Brexit still a challenge for European tourism.

International tourist arrivals in the Americas reached 216 million with a 2% growth led by Mexico and US. America with the highest per tourist spending earned 334 billion and secure 23% of international tourism receipts from 15% share in arrivals. Middle –East also enjoyed 5% growth in 2018 and hosted 60 million international arrivals, with earning 73 billion USD. Middle East shed 4% of the arrivals and 5% of the receipts from international tourism. Egypt, Jordan and Lebanon performed well in 2018.

To analyze the tourism trends in these regions, it would be useful to compare the results of the last decade. The figure below compares the shares of tourist arrivals by regions for the years 2000 and 2018.

Figure 3.3 Tourist Arrivals by Region (2000-2018)



Source: UNWTO, 2019a

The figure demonstrates that there is a tendency of increase in tourist arrivals in Asia-Pacific Region and decrease in Europe and Americas Region.

According to Tourism Towards 2030, UNWTO's long-term outlook and assessment of future tourism trends, the number of international tourist arrivals is expected to increase by 3.3% a year on average from 2010 to 2030. This represents some 43 million more international tourist arrivals every year, reaching a total of 1.4 billion arrivals by 2020, 1.5 billion arrivals by 2023 and 1.8 billion by 2030.

International tourist arrivals in the emerging-economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East, and Africa will grow at double the pace (4.4 percent a year) of advanced-economy destinations (2.2 percent a year). Emerging economies' annual growth rate is 4,5% while arrivals to advanced economies only grew by 3,5%. The market share of emerging economies increased from 30% in 1980 to 45% in 2017, and is expected to reach 58% by 2030, equivalent to over 1 billion international tourists.

International Tourism Receipts

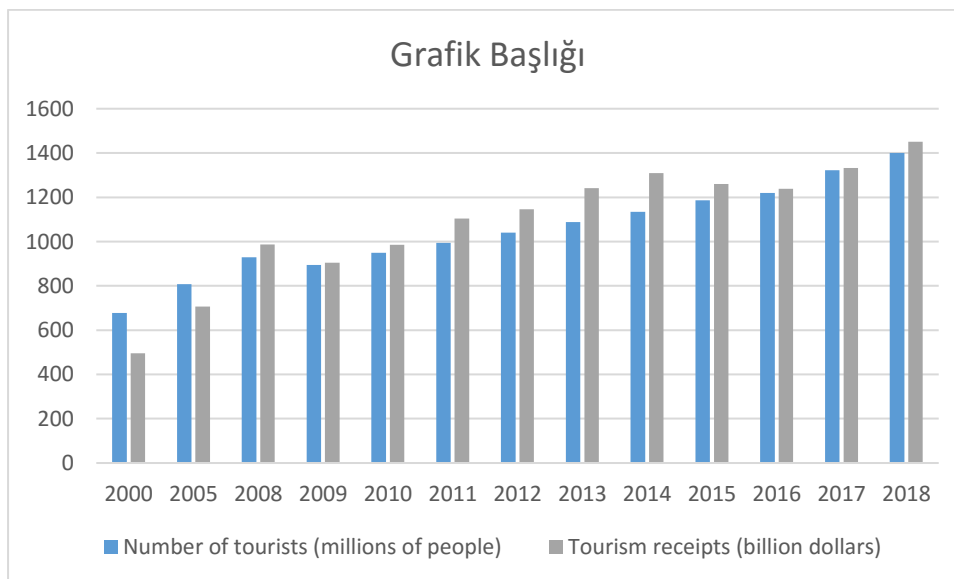
As an internationally traded service, inbound tourism has become one of the world's major trade categories. International tourism accounts for 30% of the world's export of services and 7% of overall exports of goods and services. Tourism has been growing faster than global trade for the past several years. International tourism receipts are the earnings generated in receiving countries from expenditures of international visitors on accommodation, food and drink, local

transport, entertainment, shopping and other services and goods. For the receiving country receipts count as exports and for many destinations tourism is a vital source of foreign currency earnings and an important contributor to the economy, creating much needed employment and opportunities for development. From the period 1980 to 2018, international tourism receipts increased from US\$ 104 billion in 1980 to US\$ 1,451 billion in 2018 (UNWTO, 2019a). Average spending per arrival was also a little bit above 1000 US\$.

Figure 3.5 shows the international tourism receipts as well as tourist arrivals for the period 2005-2018. International tourism receipts grew by 4.4 % in real terms (i.e. using local currencies at constant prices in order to adjust for inflation and exchange rate fluctuations) in 2018 by reaching to US\$ 1,451 billion. In absolute terms, international tourism receipts in destinations around the world increased by US\$ 106 billion compared to 2017.

In addition to receipts earned in the destinations (the travel item of the balance of payments), international tourism also generated US\$ 256 billion in exports through international passenger transport services rendered to non-residents in 2018. As such, total receipts from international tourism, including international passenger transport, exceeded US\$ 1.7 trillion in 2018 resulting a contribution of US\$ 5 billion a day to global export earnings.

Figure 3.4 International Arrivals & Tourism Receipts (2005-2018)



Source: UNWTO, 2019a

Based on 2018 data, advanced economy destinations (+4%) recorded somewhat slower growth also in receipts than emerging economy destinations (+7%). By region, the largest increase in receipts for the Asia & Pasific was recorded as +6% (in real terms) in 2018. It is followed by Europe by +5%, Middle East by 4%, Africa by 2%. Americas did not record a remarkable growth (0,3%) in 2018.

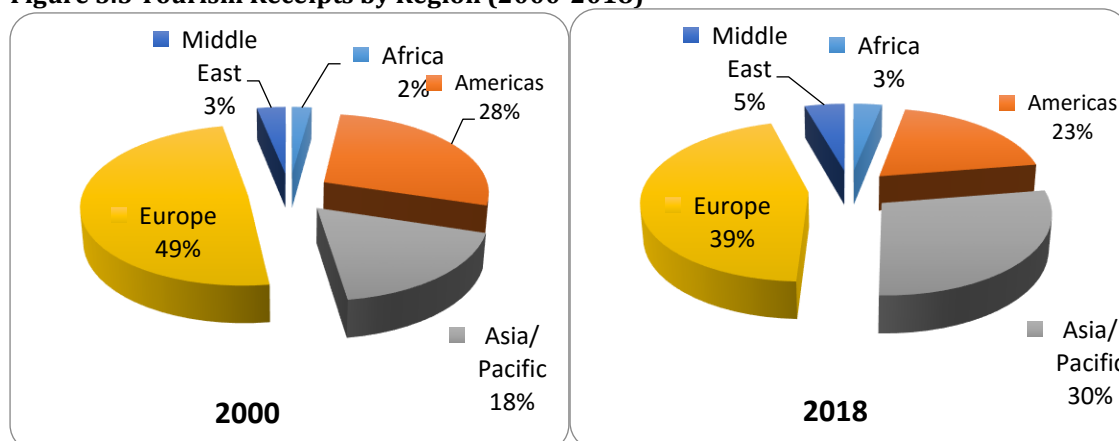
Table 3.3 International Tourism Receipts by Region (Billion \$)

Tourism Receipts	2000	2015	2017	2018	Share (%)
World	475	1,196	1332	1451	100
Europe	234.5	449.6	511,6	571	39.4
Asia & Pacific	86.7	349.4	389,5	436	30
Americas	132.8	305.6	325,7	334	23
Africa	10.8	32.8	37,8	38	2.6
Middle East	12.7	58.2	67,8	73	5

Source: UNWTO, Tourism Highlights 2002&2013&2017&2019 Edition

In Europe, international tourism receipts grew by 5%. In real terms Europe earned US\$ 571 billion from international tourism arrivals, representing 39% of worldwide receipts.

Figure 3.5 Tourism Receipts by Region (2000-2018)



Source: UNWTO, Tourism Highlights 2013 & 2017 Edition

Accounting for 30% of international receipts, in 2018, Asia-Pacific region earned US\$ 436 billion in international tourism receipts, this means an increase of 7% in real terms compared to 2016. According to the UNWTO (2019a); Americas, accounts for 23% of international tourism receipts worldwide, and increased its tourism receipts to US\$334 billion.

Based on 2018 data, compared the growth rate in arrivals Africa experienced a modest increase in receipts. Receiving 38 billion USD in 2018 the region enjoyed an increase of 2% in real terms compared to 2017.

International tourism receipts in Middle East grew more than 4% to 73 billion US\$ in 2018. Strong recovery of Egypt and robust results in other major destinations lead to larger growth rates.

4 International Tourism in the OIC Member Countries

In the light of the above mentioned overview of the trends in international tourism, this section aims to assess the performance and economic role of the international tourism in the Member Countries.

The OIC Member Countries are located in four continents on all over the world. Besides their geographical heterogeneity, the Member Countries do not constitute a homogenous economic group due to their different development levels. Most of the Member Countries are developing countries and 21 of them are the Least Developed Countries (LDCs).

Given these conditions, it is expected that tourism might play an important role in economic field regarding particularly sustainable development and poverty alleviation in the Member Countries.

According to WTTC, the total contribution of Travel & Tourism to OIC GDP in 2018 was \$589.3 billion (8.8% of GDP) in the OIC member states. This is forecasted to rise by 5% in 2018. The total contribution of travel and tourism on employment was 7.4% in 2018, which corresponds to 44.2 million jobs. Tourism is expected to create 59.4 million jobs by 2029 (WTTC, 2019). Total contribution of travel and tourism to employment in OIC member states was 42,982,500 jobs in 2017 (7.3% of total employment) (WTTC, 2018). Leisure spending (inbound and domestic) in OIC member states generated 76% of direct travel & tourism GDP in 2017. Globally tourism has created 319 million jobs in 2018. One in every five new jobs was created by tourism industry within the past five years.

Table 4.1 Estimates and Forecasts of Travel & Tourism Economic Impact in OIC Member States

COMCEC	2018 \$ billion ¹	2018 % of total	2019 Growth ²	2028 \$ billion ¹	2028 % of total	Growth ³
Total contribution to GDP	589.3	8.8	5	926.1	9.2	4.7
Total contribution to employment⁴	44.2	7.3	2.6	57.588	7.7	2.7
Leisure spending	293.5	2.5	5.0	477.8	2.5	4.5
Business spending	93.2	0.8	3.2	152.5	0.8	4.7
Capital investment	104.4	6.3	3.9	183.0	7.1	5.4

¹2018 constant prices and exchange rates; ²2018 real growth adjusted for inflation (%); ³ annual real growth adjusted for inflation; ⁴million jobs

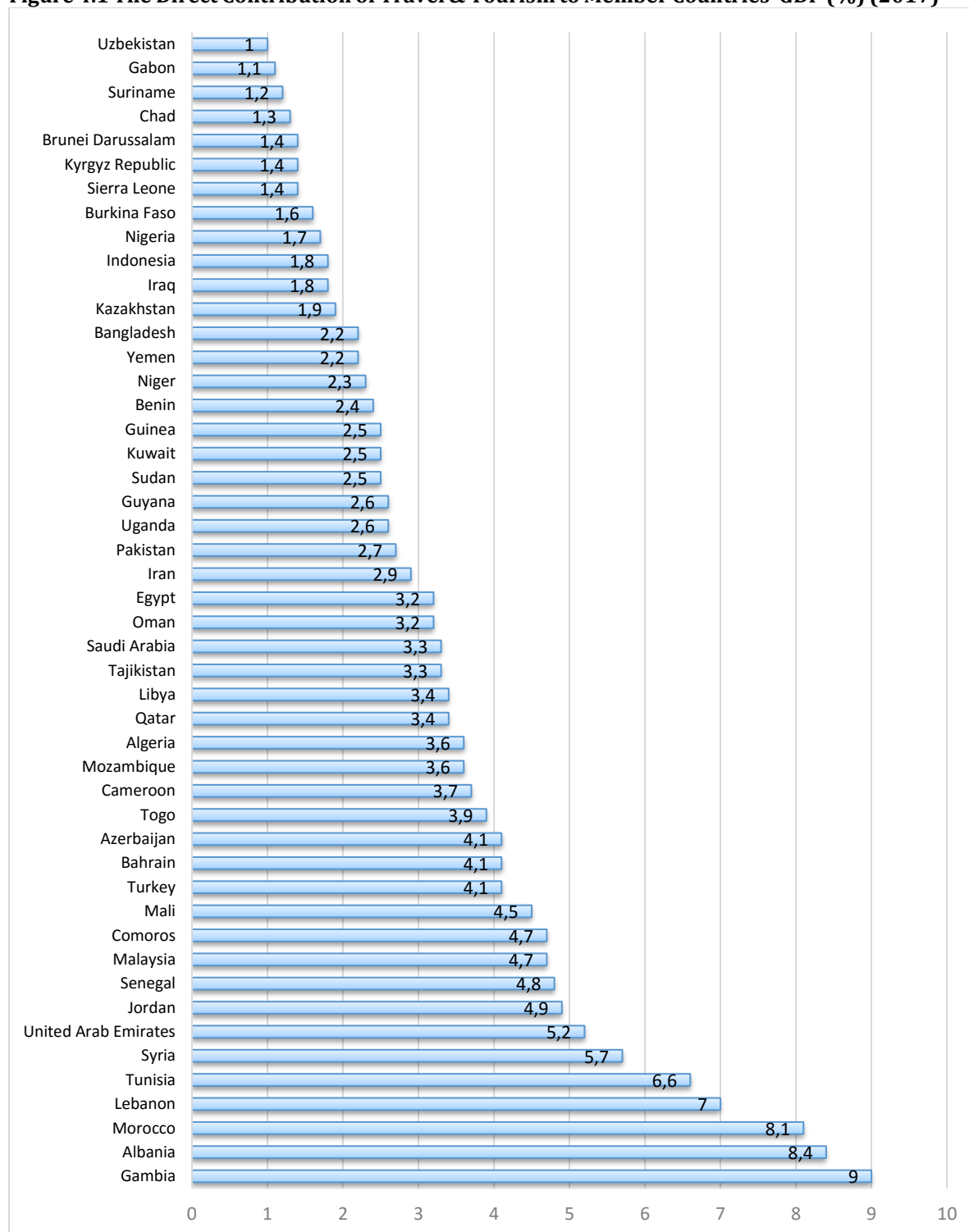
Source: WTTC, 2019, OIC Key Highlights.

International visitors to OIC spent 210.1 billion USD which accounted for 8.9% of total exports. 244.4 million international arrivals is expected to visit OIC in 2019. Domestic spending are also expected to create a similar volume (WTTC, 2019)

In Figure 4.1, direct contribution of travel and tourism to GDP can be seen for 48 member countries in 2017. This figure expresses the importance of travel and tourism for economies of member states. Meanwhile, this figure excludes Maldives, since travel and tourism's direct contribution was 39.6% in Maldives which makes the figure inapprehensible to analyze. As one of the small island developing states, Maldives is the most tourism-dependent country which relies on tourism income. This dependence on tourism in particularly island countries would make them more vulnerable, as the tourism might be unstable, particularly sensitive to economic fluctuations in the tourists' countries of departure and to international political events.

Because of its multiplier impact many countries have embraced tourism as a tool to boost their economy. GDP contribution of travel and tourism is relatively high in countries like Albania (8.5%), Gambia (8.2%), and Morocco (8.2%). As the tourism sector is vulnerable to crises, these countries are particularly more sensitive to economic fluctuations and to international political events.

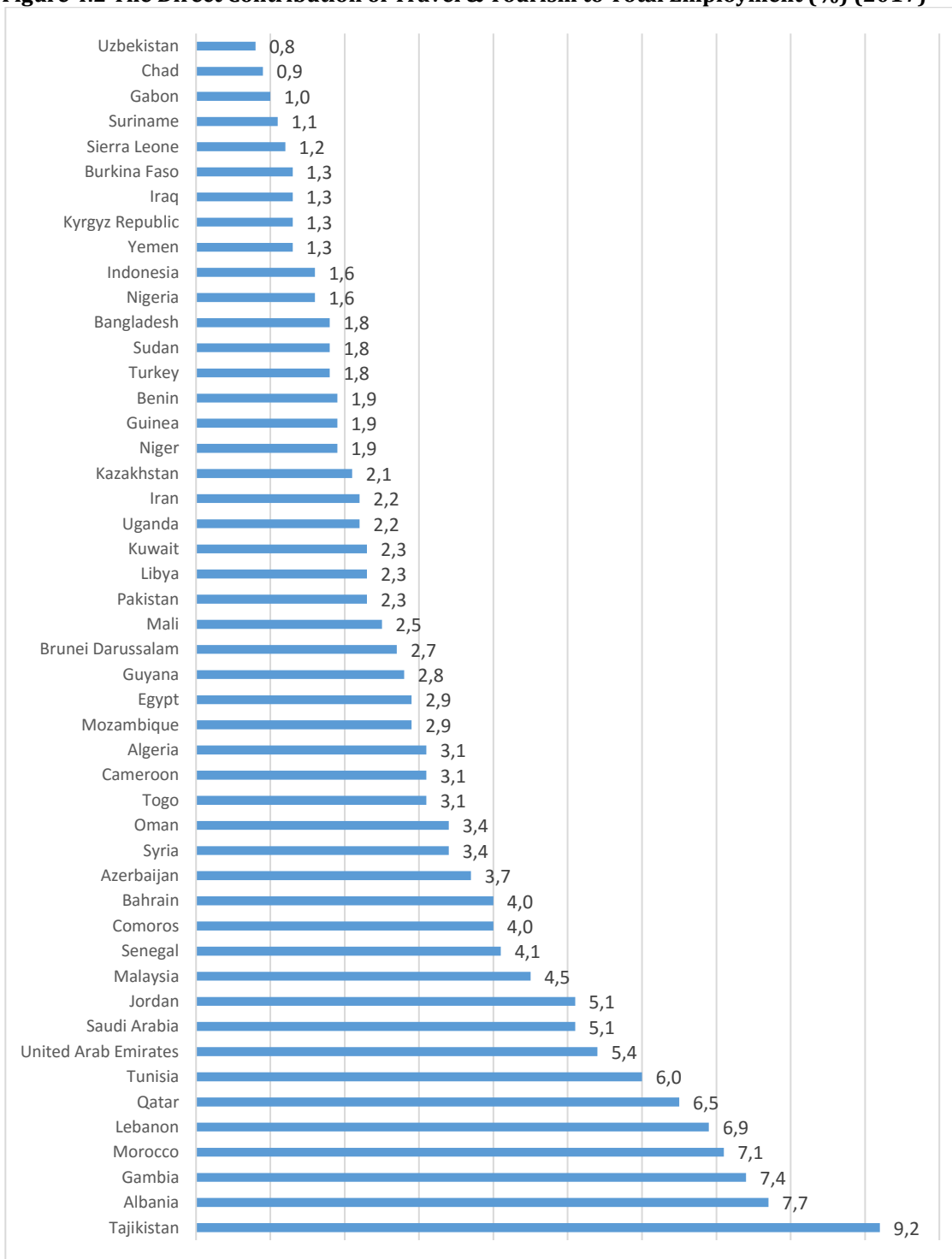
According to the WTTC data for the year 2017, countries with little reliance on tourism as part of GDP include Uzbekistan and Gabon, travel and tourism makes up about 1 percent of total GDP in each. These countries are less dependent on tourism industry in their economy. It is important to note that diversification in an economy is healthy, however if a country or region becomes dependent for its economic survival upon one industry, it can put major stress upon this industry as well as the actors involved to perform well.

Figure 4.1 The Direct Contribution of Travel & Tourism to Member Countries' GDP (%) (2017)

Source: WTTC, Country Reports, 2018

In Figure 4.2, direct contribution of travel and tourism to total employment of 48 member states can be explored excluding Maldives.

Figure 4.2 The Direct Contribution of Travel & Tourism to Total Employment (%) (2017)



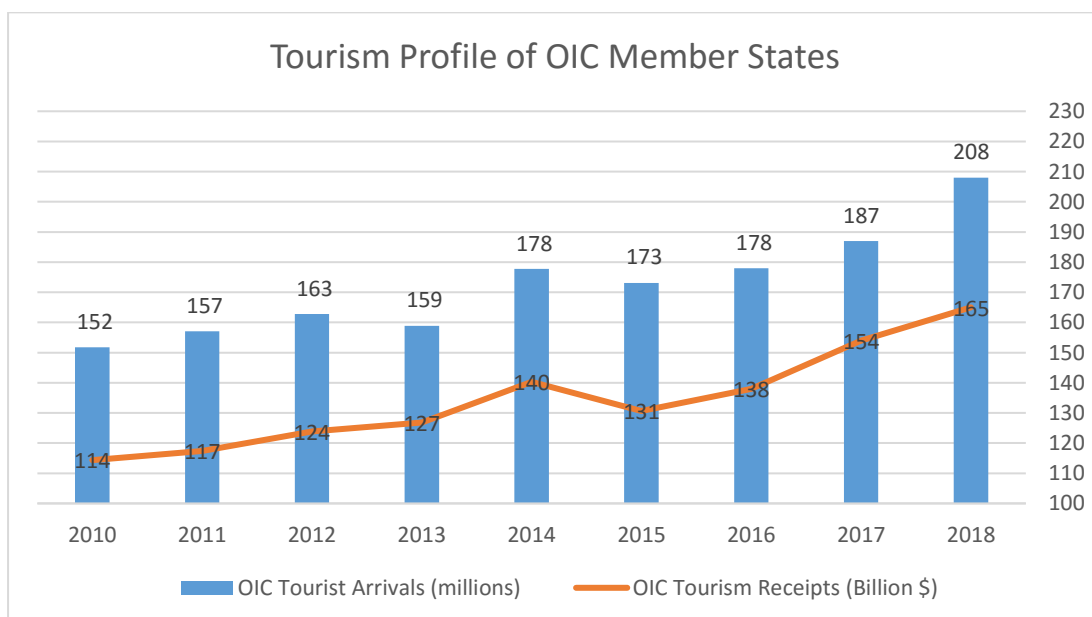
Source: WTTC, Country Reports, 2018

In 2017, Travel & Tourism directly supported 2.8% of total employment in 48 member states (See Appendix). Tourism continues to be an important economic sector capable of the creation of employment opportunities and poverty alleviation.

According to WTTC, 16% of total employment depends on travel and tourism in Maldives for the year 2017. Direct contribution of travel and tourism was 7.7% in Albania, 7.3% in Jordan and 7.1% in Morocco in 2017. Since tourism affects transportation, hotels and lodging, food & beverage, cultural and entertainment, banking & finance and promotion and publicity services and so on tourism's contribution to employment tends to be slightly higher in these countries. However, in some countries like Uzbekistan, Chad and Gabon, travel and tourism contribution is less than other sectors.

Figure 4.3 displays international tourism activity in the member countries in terms of both tourist arrivals and tourism receipts in recent years. Because of lack of data on the number of tourist arrivals and tourism receipts of some countries estimations are made. During the 2010-2014 period, shown in Figure 4.2, there was a trend of increasing tourist arrivals, however, in 2015 the number of tourist arrivals decreased from 178 million to 173 million in OIC Member States and reached 2014 numbers back in 2016. The share in the total international tourist arrivals worldwide decreased from 14.6 percent in 2015 to 14.4 percent in 2016. The last two years, 2017 and 2018 had a historical record in arrivals, respectively around 10%.

Figure 4.3 Tourist Arrivals and Tourism Receipts in the OIC Member Countries

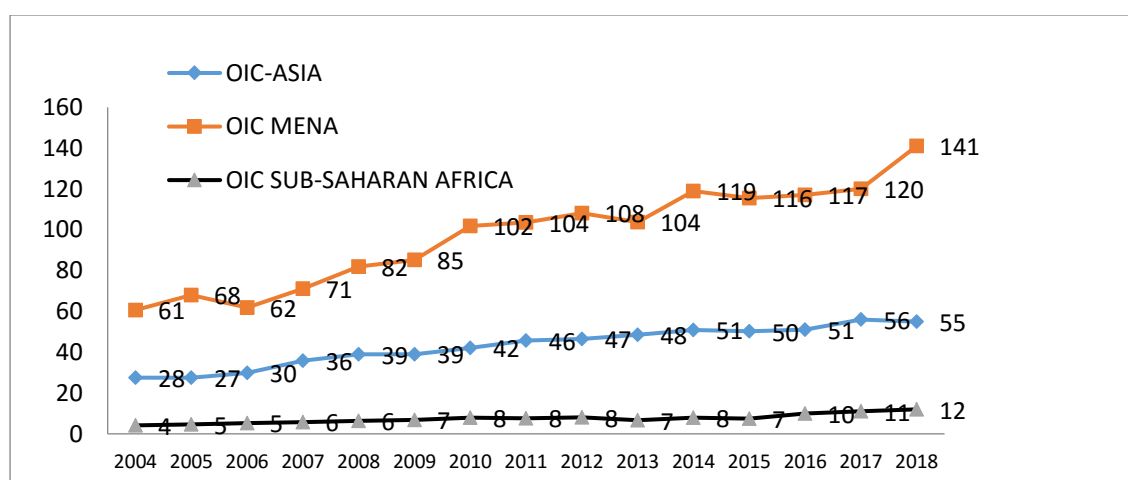


Source: adopted from UNWTO, 2017

The number of tourism receipts of the member countries increased from \$138 billion in 2016 to \$154 billion in 2017, corresponding to a 11 percent share in world's total tourism receipts. The receipts are expected to increase to 165 billion in 2018. Generally, a certain destination becomes more price-competitive when its currency depreciates relative to the currencies of its source markets. Similarly, it becomes less affordable, when its currency appreciates against the currencies of its visitors. An appreciating currency increases the purchasing power of a country's travelers abroad, but makes the destination more expensive for international generating markets against whose currencies it has appreciated.

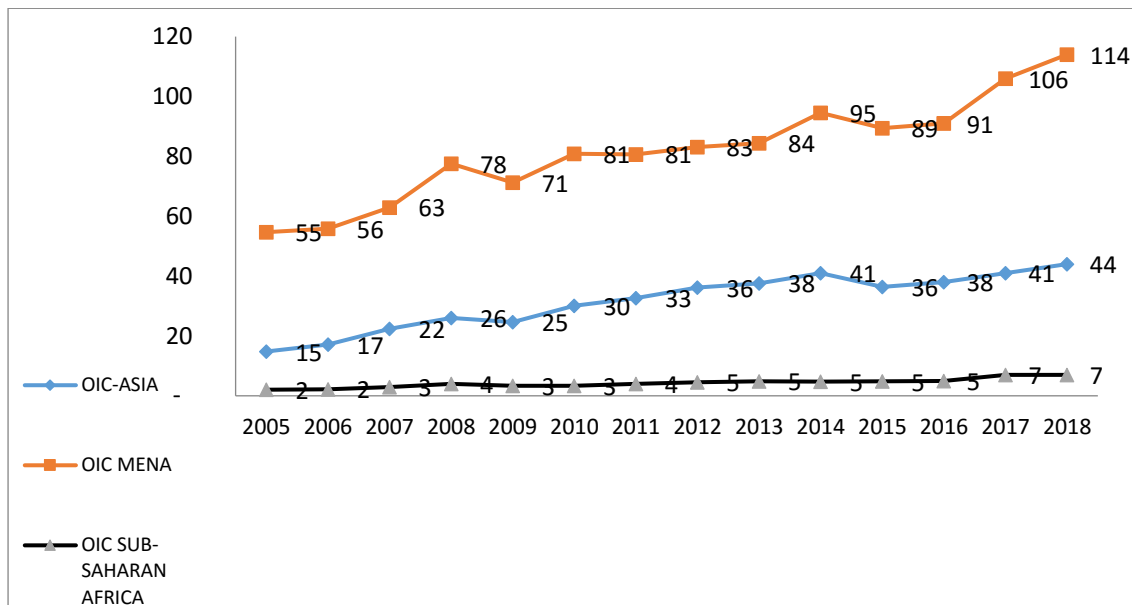
It can be useful to analyze the trends by grouping the OIC member countries as OIC-MENA, OIC-Asia, and OIC-Sub-Saharan Africa, which are provided at Figure 4.4. As displayed in the figure OIC-MENA has the biggest share among tourist arrivals in the member states. In this region, the number of tourist arrivals increased from 117 million to 120 million in 2017 and 2018 projections show another leap to 141 million according to available data.

Figure 4.4 Tourist Arrivals in the OIC Sub-Regions (Millions)



Source: UNWTO Tourism Highlights 2006, 2009 and 2017 Editions.

Figure 4.4 shows that OIC-Asia has experienced continued growth in tourist arrivals for the period 2004-2018. In 2016, 51 million tourists travelled to OIC-Asia region. This tendency has increased and get finalized around 55 million for 2017 and 2018. The OIC- Sub Saharan Africa constitutes the smallest portion of the international OIC Tourism but this region experienced a strong growth since 2016. Recording a 10% increase each year OIC Africa hosted 12 million tourists in 2018. Similar analysis can be made for tourism receipts in these groups. Figure 4.5 shows that tourism receipts in OIC-MENA is greater than the other two regions.

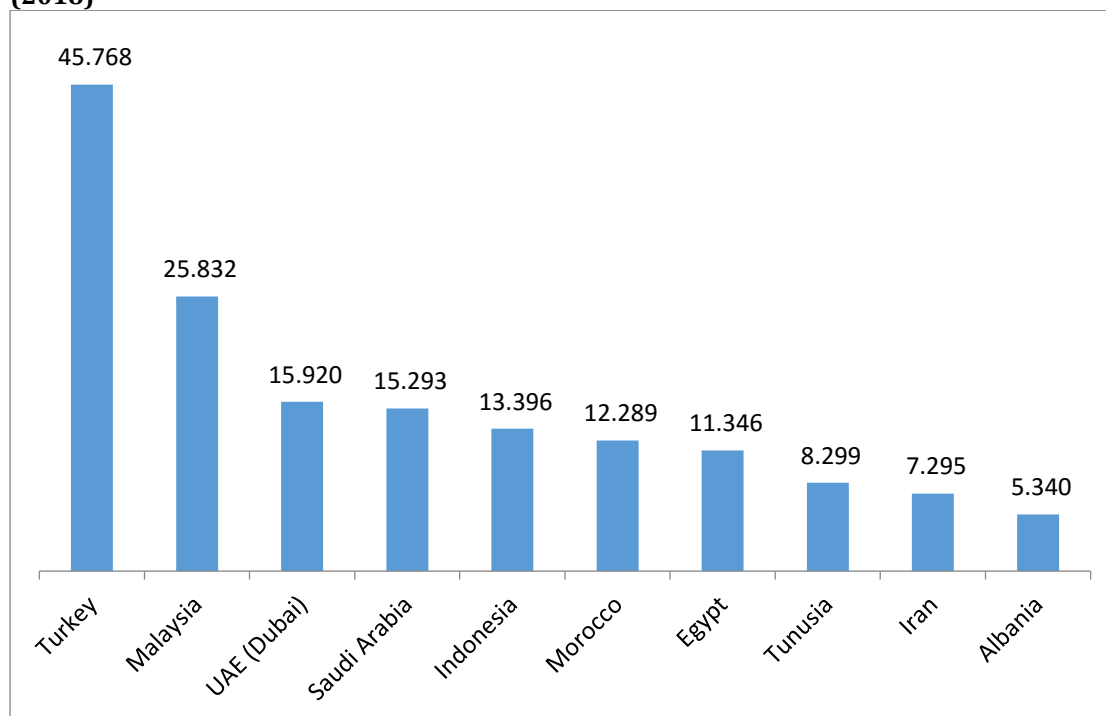
Figure 4.5 Tourism Receipts in the OIC Sub-Regions

Source: UNWTO Tourism Highlights 2006, 2009 and 2016 Editions.

According to available data, tourism receipts in OIC Mena increased from \$91 billion in 2016 to \$106 billion in 2017 and \$114 billion in 2018. OIC Asia and OIC Mena also recorded historical high tourism receipts with \$44 billion and \$7 billion in 2018 respectively. It is important to note that exchange rate fluctuations can represent comparisons in total spending between countries, as well as changes in absolute terms over time. For example, if the US dollar appreciates versus the currency of one-member state, tourism spending in this country translates into a lower amount of US dollars from one year to another. This does not necessarily mean that spending was lower, but simply that the same amount of that country's currency converts into less dollars.

The distribution of the tourist arrivals and tourism receipts among the OIC Member States has demonstrated the fact that international tourism in the Member Countries is concentrated in a few countries. In terms of tourist arrivals, Turkey, Malaysia, UAE (Dubai), Saudi Arabia, Indonesia, Morocco, Egypt, Tunisia, Iran and Albania were the top 10 international tourist destinations among the Member Countries in 2016. As shown in the Figure 4.6, these 10 countries together hosted 160.8 million international arrivals in 2018.

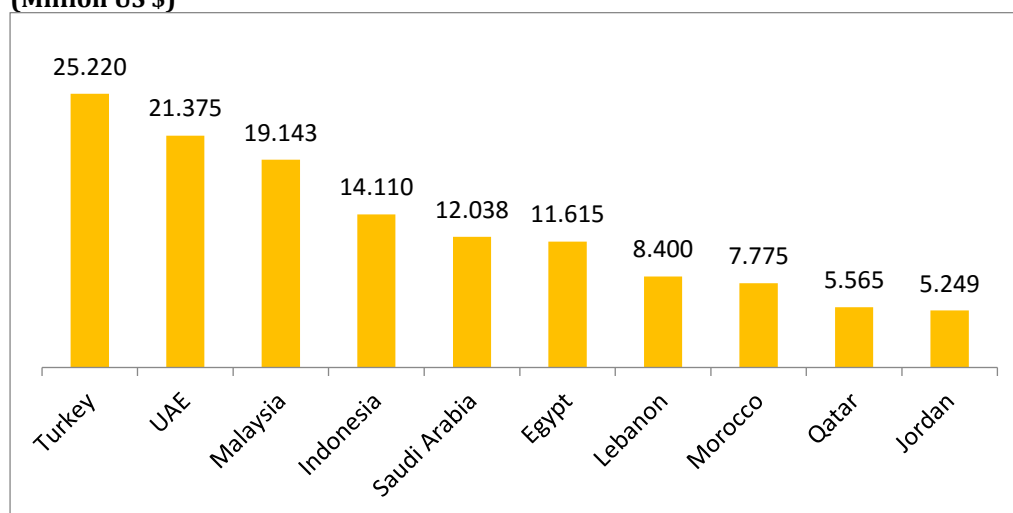
Figure 4.6 Top 10 OIC Tourism Destinations in International Tourist Arrivals (Thousand) (2018)



Source: UNWTO, Tourism Highlights (2019)

Concerning the international tourism receipts, top 10 Member Countries, shown in Figure 4.7, earned US\$ 130 billion as international tourism receipts in 2018. This was US\$ 111 billion in 2016, thus a surplus of around 20 billion USD was created in two years.

Figure 4.7 Top 10 OIC Tourism Destinations in International Tourism Receipts in 2018 (Million US \$)



Source: UNWTO, Tourism Highlights 2017

As in the case of OIC tourist arrivals, the Figure 4.7 indicates that tourism receipts in the OIC countries are concentrated in a small number of countries, almost the same countries of the main COMCEC tourist destinations. The remaining OIC Member Countries' tourist arrivals and tourism receipts data are given in Appendix (Table 1 and Table 2) most OIC member statistics are not yet available for 2018.

Turkey hosted 45.8 million tourists in 2018. Turkey recorded a 22% increase in arrivals in 2018 and reached 46 million arrivals placing the country on the 6th country with largest tourist volume. UAE recorded a slight increase in 2018 both in arrivals and receipts, hosting around 16 million tourists and receiving 21 billion USD tourism income. Malaysia experienced a slight decrease in 2018 in arrivals, yet the receipts grew by almost 5%. Malaysia introduced online visa applications for its major markets. Awareness of the country's many attractions is improving and international transport connections are expanding, making Malaysia much more accessible to potential visitors. As number of visitors to Malaysia increases over time, it is expected that investment in the hotel and accommodation sector will expand. Moreover, Malaysia Airlines and Emirates Airlines are launching a widespread code-share partnership in 2016, expanding Malaysia Airlines' access to European destinations and Emirates' access to various destinations in Asia (BMI Research, 2016). 2018 arrivals reached almost 26 million for Malaysia.

Tourism industry in Indonesia is growing rapidly, benefiting from proximity to major regional markets, an expanding luxury hotel sector and greater international air connectivity. Also supporting growth in the tourism sector is ongoing and widespread government led investment in transport infrastructure which is gradually improving accessibility across Indonesia's many islands. Indonesia has also introduced visa free travel for visitors from 90 countries allowing a 30-day tourism stay for many markets including Saudi Arabia and India (BMI Research, 2016).

Saudi Arabia reported a slight decrease in arrivals and receipts in 2018. Following the tragic loss of life in the September 2015 stampede during a Hajj ritual outside of Mecca, the government, having come under significant international criticism for its handling of the event, has committed to major investments in transport, safety and accommodation infrastructure in order to support the rapid expected expansion in international arrivals each year for religious pilgrimage. The government is reportedly considering easing visa restrictions to encourage more international tourism arrivals. Further, the outlook for sector has arguably brightened following the launch in April 2016 of the government's economic diversification strategy, referred to as Vision 2030. Religious pilgrimages remain the largest source of inbound tourism to Saudi Arabia and the government continues to invest in supporting infrastructure such as the 450km high speed rail network connecting Madinah with Makkah, King Abdullah Economic City and Jeddah (BMI Research, 2016). Saudi Arabia hosted more than 15 million arrivals in 2018.

Egypt another major OIC destination continued its rebound and recorded a 37% increase in arrivals and 49% in receipts thanks to increase in visitors from European source markets. Lebanon recorded a slight increase of 6% in 2018 concerning arrivals and more than 10% in receipts. In 2018, Morocco (8%) posted strong results on arrivals and receipts (5%). The strength of the Euro against the Moroccan dirham, combined with the increasing number of low-cost airlines and routes between European countries and Morocco, will drive up the number of

inbound arrivals in the next five years. A slight increase in arrivals and a larger impact on receipts from 6bn to 7 billion USD is already recorded in 2016. Qatar recorded a 19% decrease in arrivals and 7 % decrease in receipts after diplomatic crises. Yet the impacts are fading with the help of visa facilitation, investments and marketing efforts.

The highest growth was experienced in Iran. Iran reported 50% increase in tourist arrivals in 2018. The government has defined twelve areas in the Sixth Development Plan (2016-21) with solely focusing on tourism. Since desert-trekking appears to be a favorite hobby of western travelers, the authorities have resolved to create 2,000 ecotourism resorts by the end of the sixth five-year development plan (2016-21), nearly a third of which will be located in Lut Desert. Tunisia also experienced a double digit growth in arrivals with 18% and 31% increase in receipts. Albania also made it to the top 10 arrival list within the OIC countries recording a 15% increase in arrivals and 14% in receipts. Palestine also experienced a 20% growth in arrivals and 9% in receipts.

In order to compare the performance of the countries, major surplus on the travel balance would be a useful tool, since it shows that more foreign exchange stays in the country. Table 4.2 shows member countries by major surplus on the travel balance between 2013 and 2016.

Table 4.2 Member Countries by Major Surplus/Deficits on the Travel Balance in 2013-2016 (US\$ billion)

	Tourism Receipts			Tour. Expenditures			Balance		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
Turkey	29.6	26.6	19	5.1	5.4	4,8	24.5	21.2	14.2
Malaysia	22.6	17.6	18.1	12.4	10.5	10.5	10.2	7.1	7.6
Morocco	7.1	6.0	6.5	1.4	1.4	1.5	5.6	4.6	5
Indonesia	10.3	10.7	11.3	7.7	7.3	7.7	2.6	3.4	3.6
Egypt	7.2	6.1	2.6	3.1	3.4	-	4.1	1.7	-
Kuwait	0.4	0.1	0.2	11.3	12.4	12.3	-10.9	-12.3	-12.1
S. Arabia	8.2	10.1	12.1	24.1	20.7	16.7	-15.9	-10,6	-4.6
UAE	14.0	16.0	19.4	14.4	15.1	17.1	-0.4	0.9	2.3
Qatar	4.6	5.0	5.4	8.7	8.2	9.6	-4.1	-3.2	-4.2

Source: UNWTO, 2017 Tourism Barometer Volume14, June 2017.

According to the Table 4.2, Turkey ranked as 6th, Malaysia as 14th, Morocco as 19th and Indonesia as 22nd country by major surplus on the travel balance in international tourism market. In 2016, for example Turkey's tourism receipts from foreigners were US\$ 18.1 billion, however Turkish citizens spent around US\$ 5 billion in other countries. This means that US\$ 14.2 billion stayed in the country as a surplus on the travel balance. This surplus is very important for countries as a source of foreign exchange in their economies. It can be realized from the Table 4.2 that some countries have a tendency to spend more than their tourism receipts. It is obvious that the majority of these countries are the main OIC international tourism destinations and earners. It is also observed that the balance of international tourism of some member countries accounts for a high percentage of their international tourism receipts. For example, countries like Saudi Arabia, Kuwait and Qatar have deficits on travel balance.

Safety and security concerns and political stability are emerging as major challenges for OIC member states, and it is assumed that these issues will continue to cause difficulties in the years ahead. Governments should work hard to ensure the safety of tourists and to minimize the impact of security threats. Terrorist incidents, refugee crises are still important obstacles for tourism in the region. The strength of the US dollar relative to other currencies is shifting the price competitiveness among destinations and will affect market share and rankings of OIC destinations.

5 Destination Marketing in the OIC Member Countries¹

The COMCEC Tourism Working Group in its 14th Meeting, will focus on multi-national tourism corridors and provide recommendations on the identification, development, marketing and management of multi-destination tourism corridors within member countries. Destinations possess various tangible (e.g. nature) and intangible (e.g. culture) resources that attract tourists to the region. And each destination has unique characteristics that offer different and complimentary experiences to tourists. These complimentary touristic attractions and resources might be located in various destinations across international borders. Various natural (e.g. Niagara Falls) and cultural (e.g. Silk Road) tourist products located across multinational regions require a holistic approach for effectively managing tourism products, marketing the destination, creating shared brands, products and improving the visitor experience.

The role of meta management in destination success has already been acknowledged in the literature. As dynamic systems, destinations require complex and sophisticated structures to be managed and governed so that their development is sustained at a desirable level. The modern tourism industry requires the establishment of well-organized Destination Management Organizations (DMOs) at the local and regional level. Such structures would be utilized for international tourism corridors where a central management structure is required to coordinate different stakeholders located at different countries. The organizational structure, responsibilities (development, marketing and management), funding, stakeholder relationship and coordination of these international destination management organizations need to be explored in order to identify best practices.

COMCEC Tourism Working Group has already examined destination management and marketing issues and sustainability of tourism destinations. Yet, a specific focus on international tourism corridors and intergovernmental destination management is needed to develop multi-destination tourism corridors. Developing multi-national tourism destinations and international thematic tourism corridors will be tackled during the 14th Meeting of The COMCEC Tourism Working Group. Particularly the challenges related to structures, product development, marketing, coordination of external and internal stakeholders, mobility of services and people, effective use of shared resources, dependency and sustainability issues can be better addressed be overcome through a central DMO that coordinates individual stakeholders located in different countries.

Managing visitor movement, visa processing, bundling attractions, managing borders and entrances, transportation and marketing are particularly important decisions to be made unilaterally. The general objective of destination management strategies is the development of the destination in such a way that the current and future tourist experience is enhanced, the stakeholders are satisfied and environment is preserved. Four main strategic management objectives for destinations are; ensuring long-term prosperity of locals (1), maximizing visitor satisfaction (2), maximizing profitability for entrepreneurs (3), and minimizing negative tourism impacts by creating a balance between economic benefits and environmental costs (4)2.

¹ The 14th Meeting of the COMCEC Tourism Working Group will be held with the theme of Destination Marketing Strategies in the OIC Member Countries. Thus, the Tourism Outlook 2017 includes this section as an introductory section for the meeting.

² Buhalis, D. (2000). Marketing the competitive destination of the future. *Tourism Management*, 21(1), 97-116.


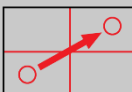
Creating various potential multi-national tourism corridors in OIC and integrating these into tourism planning and development policies of individual countries would result in joint development, marketing and management of these multi-national destinations and would be helpful for the member countries to cooperate and create synergies in developing their tourism industries.

Destinations are “systems” and “networks”, beyond physical spaces, therefore destination development should be structured on a strong authority, taking its roots from networking skills, as well as professionalism, transparency, and resource endowment. Without a well-designed development strategy and stakeholder engagement; individual activities of countries and actions might create conflicts, overlap, become fragmented and result in waste of scarce resources. Thus, the ideal multi-national DMO should create the much needed collaboration and efficiency for sustainable development of international tourism corridors. DMOs also create economies of scale in marketing and cost sharing, audit stakeholders, manage use of shared resources and internalize external costs of tourism activity for a more sustainable development. In order to preserve natural environment and enhance economic benefits and to distribute latter equitably, tourism must be planned, developed and managed within a hierarchy of structures ranging from the local to the territorial or provincial, to the national, and even to the international level. The responsibilities at each level should be clearly identified and implemented for potential multi-destination tourism corridors. Therefore, identifying potential multi-national tourism corridors and understanding the processes that lie within the potential multi-destination development strategies are significant for OIC countries. Equity, participation, accountability, responsiveness, transparency, monitoring and control are other features of effective international destination management and institutionalization strategies. In the analytical study, it is expected that these recommendations will be elaborated for the member countries and offer alternative tourism corridors, development, marketing, management strategies, solutions and implementation. In this regard a policy framework is suggested as displayed at Table 4.3.

The following policy framework is used to provide recommendations for OIC tourism corridors based on whether they are new or established corridors as well as whether they are close on the tourism readiness of OIC countries and openness spectrum.




Table 4.3 Policy Framework for Cross-Border Tourism Corridors





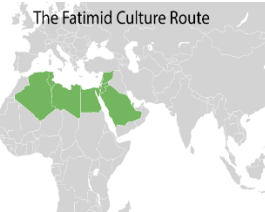

	New corridors	Established corridors
Planning & Establishment	Demand Analysis	
	Infrastructure Assessment	
	Benefits Assessment	
	Formulating Theme	
Governance & Management	Governance Structure	Governance Structure
	Monitoring Performance	Monitoring Performance
	Stakeholder management	Stakeholder management
	Capacity Building	Capacity Building
	Funding	Funding

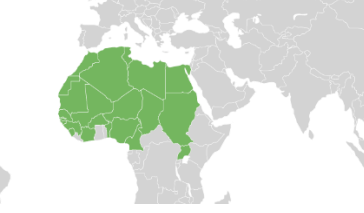
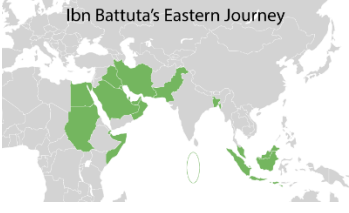
	Monitoring	Monitoring
Marketing & Promotion	Branding	Branding
	Promotions	Promotions
	Product development	Product development
Countries on a corridor with similar indicators 	Joint development of a new corridor with equal shares	Joint enhancement of established corridor with equal shares
Countries on a corridor with varying indicators 	Knowledge transfer from developed countries to less-developed countries	Knowledge transfer from developed countries to less-developed countries

After looking into existing tourism corridors between OIC countries, possible cross-border corridors to promote specific themes or regions of OIC countries collaboratively.

Table 4.4. Potential OIC Tourism Corridors.

Islamic Silk Road Countries  <p>The Islamic Silk Road is the center of where East and West meet. Representing a strong Islamic tradition and a melting pot of cultures, it represents what most people associate with the historic Silk Road. A connection between Asia and Europe. As a sub-corridor of the UNWTO Silk Road Program, this corridor can be a very powerful brand, showcasing Islamic history and its role in the Silk Road in contrast to the Chinese and European influence.</p>	Alexander the Great  <p>One of the best known ancient Greek emperors, Alexander the great has a high name recognition internationally. Most countries ruled by the Macedonian king are OIC countries. Taking over the leadership in an Alexander the Great corridor in collaboration with Greece would position OIC countries as a connector between East and West.</p>	The Travels of Imam Bukhari  <p>Imam Mohammed Al-Bukhari is considered as one of the most distinguished scholars of Hadith in Islamic history. His book Sahih al-Bukhari, in which the Prophet's words, actions, or habits were collected, is one of the greatest sources of the prophetic influence in history. Even though this is not an "official" tourism corridor, it can be seen as the biggest influence on Muslim travel in the region.</p>
Bedouin Trails countries	Cross-Border Parks and Protected Areas	The Frankincense Route

<p>Bedouin Trails</p>  <p>A corridor promoting the distinct Arabic heritage and tradition of the nomadic Bedouin people would open up the region to international travelers. With a focus on making the culture accessible, it would bring the great natural and cultural heritage of the region closer to a larger number of visitors.</p>	<p>Cross-Border Parks and Protected Areas in West Africa</p>  <p>In 2006, the OIC had the 1st meeting of the Committee on the Regional Project of “Sustainable Tourism Development in a Network of Cross-Border Parks and Protected Areas in West Africa.” At this point numerous interventions were coordinated by member countries to discuss potential corridor development.</p>	<p>The Frankincense Route</p>  <p>A network of trade routes had been established between historical OIC countries, carrying goods such as salt, wheat, wine, weapons, dates, and animal skins from one fortified settlement to another. These paths were the basis of the frankincense trade routes between the kingdoms of southern Arabia, which formed the starting point of the route towards the north. For centuries, incense trade routes from Arabia to the Mediterranean were specifically made with camel caravans although, this was not just a single and permanent route. This distinct branding would promote the historical role of the region.</p>
<p>Masar Ibrahim</p>  <p>Masar Ibrahim, a community-based walking trail, mainly developed in Palestine, but with an ambition to include the whole of Abraham’s Path, through Egypt, occupied Palestine, Turkey Syria, and Iraq.</p>	<p>The Fatimid Culture Route</p>  <p>The Fatimid Culture Route would put a focus on early Islamic history and its influence on culture and Architecture of the Middle East and Northern Africa.</p>	<p>Red Sea Tourism Corridor</p>  <p>The Red sea is a divider and also a connection between a number of OIC countries. Since opening of the Sues Canal, it became even more important than it was in ancient times as a trading route.</p>

Trans-Saharan Trail	Ibn Battuta's Eastern Journey	
 <p>Based on the old Trans-Saharan trade routes, this tourism corridor connects northern African countries with the Sub-Saharan OIC countries. With a strong association with caravans and deserts, this corridor can have a strong message and branding.</p>	 <p>Ibn Battuta is one of the most distinguished Muslim explorers and travelers. Born in Morocco in the 13th century, he visited most of the Islamic world, including Central Asia, Southeast Asia, South Asia, and China. This corridor could have a strong branding once formalized and become part of the UNWTO Maritime Silk Road. It might be recommended to include China into this corridor to benefit from its strong economic muscle and travel market.</p>	

The details of suggested tourism corridors as well as developing, marketing and management strategies, tactics and actions are to be presented during the 14th Meeting of the COMCEC Tourism Working Group in September, 2019. In the analytical report, it is expected that these recommendations will be elaborated for the member countries and offer solutions and implementation for improving both volume and quality of tourism activity.

6 Importance of Tourism Cooperation in the Member Countries

6.1 Tourism Potentials & Obstacles Faced in the Tourism Development and Cooperation in the Member Countries

OIC Member Countries have potential for the development of a sustainable international tourism sector with rich and diverse natural, geographical, historical and cultural heritage assets. OIC Member Countries' performances in tourism sector indicate that the share of the Member Countries in the global tourism sector is behind full potential and there is still a great deal of scope for realizing their full capacity.

It is acknowledged that both established and new destinations need to plan and create the adequate conditions and policies with regard to:

- Business environment
- Infrastructure
- Travel Facilitation
- Marketing

- Human resources

So the Member Countries can increase the social and economic benefits and minimizing negative impacts via utilizing the tourism potential.

Figure 6.1 Tourism Opportunities in the Member Countries

Natural Resources
Cultural Resources
Human Resources
Authenticity and novelty
Price competitiveness
Dynamism

Tourism is a dynamic sector that is subject to political, social, environmental and technological trends, shaping tourist preferences, skill requirements of tourism related-jobs and structure of the tourism market. It is crucial for the Member Countries to engage in the long-term global tourism market trends and to build sound tourism policies in order to improve their competitiveness in the global tourism market.

There are many challenges faced by the Member Countries for developing their tourism sector and making it internationally competitive. Challenges faced in the tourism development are diverse as each country has its own tourism assets, level of development and national development priorities and policies. The challenges affecting tourism performance in the Member Countries ranges from, among others, insufficient tourism-related infrastructure and investments, unskilled tourism workforce to low-capacity tourism administrations and lack of safety and security (COMCEC Progress Report, 2013), as shown in Figure 6.2.

In order to address the challenge of insufficient tourism-related infrastructure and investments, the quality and efficiency of tourism infrastructure and services need to be improved in conformity with the international standards. To develop tourism-related infrastructure in the Member Countries, private sector's resources can be utilized. In this respect, Public-Private Partnerships (PPPs) can be promoted and an enabling environment can be provided for attracting more FDI in the tourism sector. In the case of many Member Countries, these challenges still include the lack of technical know-how and the weak promotional activity.

Due to its labor-intensive nature, tourism sector requires a highly qualified workforce that has a direct effect on the quality of tourism services. Despite the fundamental awareness and basic perception of the economic importance of tourism as an industry and its positive impact as a potential source of foreign exchange earnings and employment, in many cases there is lack of trained tourism workforce. Thus, training programs and projects need to be developed for upgrading the quality of workforce in the member countries.

Figure 6.2 Challenges Affecting Tourism Performance in the Member Countries

Insufficient Tourism Investments and Infrastructure
Poor Tourism Planning & Product Development
Travel Facilitation Problems
Safety and Security Related Problems
Low Tourism Service Quality
Insufficient Marketing and Promotion
Insufficient Image Building and Branding

These challenges should be addressed for the sustainable growth of tourism sector in the Member States. These are common challenges among the countries; however, each member state should specify the high-priority challenges considering its own conditions and try to solve the problems in the tourism industry.

The issue of developing consistent tourism strategies and policies is also one of the main challenges facing many Member Countries, which are still experiencing difficulties in developing integrated tourism policies. Effective administration, data collection, regulation and institutional frameworks are important issues to be improved for the tourism activities.

The absence or weak publicity promotion and mass media exposure due to the limited communication systems and technological services are other obstacles for tourism development in the OIC Member Countries. It is recognized that electronic media (CD-ROM maps, Internet, web sites, etc.) will be increasingly used for the purpose of choosing destinations and making reservations. Therefore, the COMCEC countries should improve their promotion through electronic official and social media.

6.2 Tourism Cooperation under the COMCEC Umbrella

Tourism cooperation could play a significant role in the socio-economic development of the COMCEC Member Countries, if properly planned and managed.

The COMCEC Economic Summit, held in İstanbul in 2009, has prioritized the cooperation in the field of tourism sector. Since then, the COMCEC has increased its efforts for enhancing cooperation among the Member States in tourism.

In addition to ongoing activities such as Tourism Ministerial Meetings, workshops, seminars, tourism fairs, COMCEC encourages modalities that enable involvement of relevant stakeholders such as private sector and local communities in tourism activities. In this respect, the "OIC/COMCEC Private Sector Tourism Forum" was established in 2011 and convened its 1st Meeting on 7-8 December 2012 in İzmir, Turkey. The Forum annually brings together the private sector representatives of the member states operating in the field of tourism to share their experience and explore ways and means to enhance the cooperation in this field. The 2nd Meeting of the OIC/COMCEC Private Sector Tourism Forum was held on 16-17 December 2013

in İstanbul with the theme of "Effective Marketing Strategies for Promoting Tourism Destinations in the OIC Member Countries."

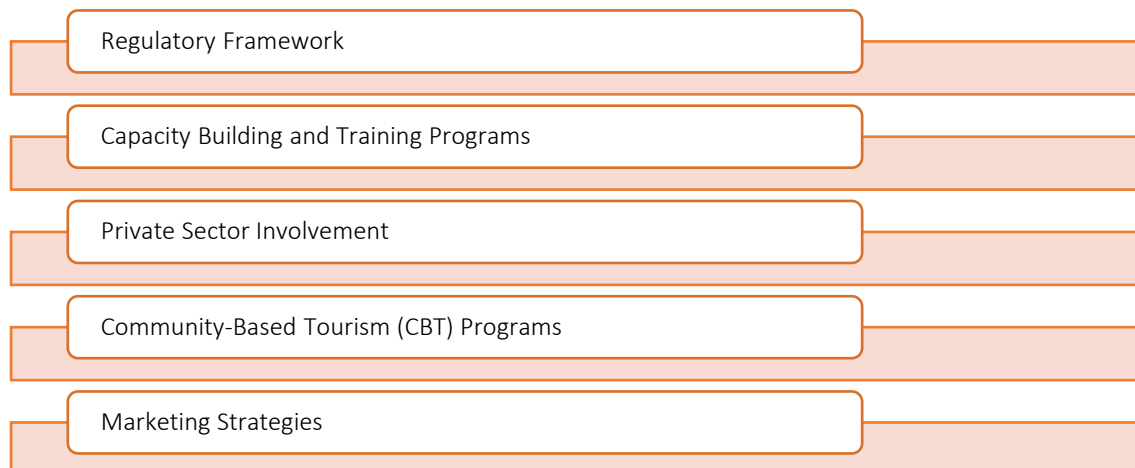
Moreover, the 3rd Meeting of the OIC/COMCEC Private Sector Tourism Forum was held on 29-30 January 2015 in İstanbul with the theme of "International Branding of Tourism Destinations in the OIC Member Countries." The Forum emphasized the importance of effective marketing and branding strategies for promoting the tourism destinations in the OIC Member Countries and highlighted that effective marketing and branding requires utilization of full range of tools available including digital marketing activities, social media, mobile phone applications, PR, and so on. Furthermore, importance of multi-stakeholder engagement is underlined as a critical success factor for tourism branding particularly through utilizing Public Private Partnerships and stressed the significance of joint endeavors such as joint promotion work, cultural tourism routes and joint tours and familiarization programs/trips to overcome the negative media image of Islamic Countries resulting from misguiding media coverage and problems like Islamofobia, Epidemics, Terror, and so on.

The 4th Meeting of the OIC/COMCEC Private Sector Tourism Forum was held on 14-15 January 2016 in İstanbul with the theme of "Promoting Muslim-Friendly Tourism (MFT) Products and Services in the OIC Member Countries." In this forum, the participants discussed the current state of international tourism in the OIC Member Countries as well as prospects and challenges in this regard. Moreover, the participants also deliberated on the global trends and policies in promoting MFT products and services and the challenges faced by the private sector in the Member Countries in promoting MFT products and services. The participants emphasized the importance of raising awareness about MFT, not only in the OIC Member Countries, but also in the Non-OIC world. In this regard, the participants highlighted the significance of the effective utilization of the existing mechanisms under the OIC/COMCEC, such as SMIIC's technical Committee on tourism, for enhancing cooperation in MFT.

Tourism has been defined as one of the six cooperation areas in **the COMCEC Strategy**, adopted by the 4th Extraordinary Summit held on 14-15 August 2012 in Makkah Al-Mukarramah, Saudi Arabia.

The Strategic Objective defined by the COMCEC Strategy is ***"Developing a sustainable and competitive tourism sector in the OIC Member Countries."*** With a view to achieving this objective, the Strategy envisages five output areas, namely regulatory framework; training and capacity building programs; private sector involvement; community based tourism programs and marketing strategies.

Figure 6.3 Output Areas in the Tourism Section of the COMCEC Strategy



In order to achieve the objectives in the field of tourism, the COMCEC Strategy brings two new and well-defined implementation instruments, namely Tourism Working Group and the COMCEC Project Cycle Management (PCM).

COMCEC Tourism Working Group aims at providing a platform for the member states for elaborating issues thoroughly, sharing their experience and best practices and creating a common understanding to respond their common problems.

In this framework, the 1st Meeting of the COMCEC Tourism Working Group was held on April 25th, 2013 in Ankara, Turkey with the theme of “*A New Trend in Sustainable Tourism Development: Community Based Tourism in the OIC Member Countries.*” The Meeting was attended by the representatives of 15 Member States, which have notified their focal points for the Tourism Working Group. The relevant OIC institutions and some scholars have also attended the Meeting. The representatives of the Member States have shared their experiences, achievements and challenges in implementing the Community-Based Tourism (CBT) Programs in their respective countries. The Meeting has considered the Studies namely “Community Based Tourism: Finding the Equilibrium in the COMCEC Context” commissioned by the COMCEC Coordination Office and the “Tourism Outlook 2013” prepared by the COMCEC Coordination Office. The outcomes of the Meeting were published by the COMCEC Coordination Office with the document titled the “Proceedings of the 1st Meeting of the Tourism Working Group”, available on the COMCEC website (www.comcec.org).

The 2nd Meeting of the COMCEC Tourism Working Group was held on October 3rd, 2013 in Ankara, Turkey with the theme of “*Tourism Product Development and Marketing Strategies in the OIC Member Countries.*” The Meeting was attended by the representatives of 11 Member States, which have notified their focal points for the Tourism Working Group and representatives of the COMCEC Coordination Office, SESRIC and Islamic Center for Development of Trade (ICDT) and some private sector representatives. The COMCEC Tourism Outlook and an analytical study namely “Tourism Product Development and Marketing Strategies” have been prepared and submitted to the Meeting. The representatives of the Member States have shared their

experiences, achievements and challenges in tourism product development and marketing strategies in their respective countries as well as explore cooperation potential among each other. The Meeting highlighted that tourism product development and marketing requires effective collaboration among different stakeholders. It was stressed that because of its competitive nature, effective marketing requires utilization of the full range of tools available including among others PR activities, e-marketing, social media, and so on. Some recommendations have been made for enhancing cooperation among the Member Countries in the field of product development and marketing. These were, among others, introducing award programs, conducting joint exhibitions, developing joint tourism products, organizing exchange programs for experts and developing joint data base for tourism products among the Member Countries. Moreover, Proceedings of the Second Meeting of the Tourism Working Group, which reflects the outcomes of the Meeting was prepared and published on the COMCEC Website (www.comcec.org).

The 3rd Meeting of the COMCEC Tourism Working Group was held on March 4th, 2014 in Ankara, Turkey with the theme of “Enabling Tourism Investment Climate in the OIC Member Countries.” The Meeting was attended by the representatives of 14 Member States, which have notified their focal points for the Tourism Working Group and representatives of SESRIC, Islamic Center for Development of Trade (ICDT), International Finance Corporation (IFC) and representatives from private sector. The Representatives of the Member States have shared their experiences, achievements and challenges regarding tourism investments in their respective countries. Moreover, the Studies titled “Enabling Tourism Investment Climate: Challenges and Prospects for Tourism Investments in the OIC Member Countries” commissioned by the COMCEC Coordination Office and the “COMCEC Tourism Outlook 2014” prepared by the COMCEC Coordination Office were the main inputs for enriching the discussions during the Meeting. The presentations and deliberations made during the meeting highlighted that governments play a crucial role for creating an enabling investment climate for tourism investors. It was stressed that creating an enabling tourism investment climate requires utilization of the full range of tools and strategies including among others, provision of clear, updated information and prompt responses to investor inquiries, updated investment promotion websites, effective coordination among relevant stakeholders, providing infrastructure (including road networks, electricity, etc.), allocation of land for specific tourism projects, effective incentive packages, easy procedures and financial support for the local tourism SMEs as well as foreign entrepreneurs and utilization of alternative investment financing options such as crowdfunding.

The 4th Meeting of the COMCEC Tourism Working Group was held on September 4th, 2014 with the theme of “Enhancing the Capacity of Tourism Workforce in the OIC Member Countries for Improved Tourism Service Quality.” The participants deliberated on tourism workforce capacity, identify the challenges faced by the Member Countries as well as possible solutions to address these challenges. The Meeting provided opportunity to the Member Countries to learn from each other’s experience and good practices. During this meeting, Tourism Working Group discussed two policy options:

- Developing Tourism Workforce Development Strategies in the Member States and supporting the effective implementation of the existing ones

- The importance of enhancing the capacity of tourism workforce in the member countries.

The policy recommendations of the 4th Meeting of the Tourism Working Group were submitted to the 30th Ministerial Session of the COMCEC held on 25-28 November 2014 in İstanbul. The 30th Session of the COMCEC commended the efforts of the Working Groups towards approximating policies among the Member States in their field of competence and took note of the policy recommendations of the Tourism Working Group.

The 5th Meeting of COMCEC Tourism Working Group was held with the theme of “Travel Facilitation for Enhancing Mobility in the OIC Member Countries” on February 5th, 2015. In line with the recommendations of the analytical study and the responses of the Member Countries to the policy questions, which were circulated before the Meeting, the Working Group put forward two policy recommendations in the meeting:

- Encouraging visa facilitation among the Member Countries;
- Developing air linkages and increasing the airline capacity were highlighted by tourism working group.

The 6th Meeting of the Tourism Working Group was held on September 3rd, 2015 with theme of “Effective Tourism Marketing Strategies: ICT-Based Solutions for the OIC Member Countries.” The Representatives of the Member States have shared their experiences, achievements and challenges on ICT-based tourism marketing in their respective countries. The Meeting has considered the Studies "Effective Tourism Marketing Strategies: ICT-Based Solutions for the OIC Member Countries" commissioned by the COMCEC Coordination Office and the "COMCEC Tourism Outlook 2015" prepared by the COMCEC Coordination Office. The Meeting has come up with a set of policy recommendations:

- Building and Strengthening a Skilled Workforce on ICT-Based Tourism Marketing in the Member Countries
- Enhancing cooperation between the government and private sector on ICT usage and diffusion in tourism marketing
- Developing comprehensive and effective digital marketing strategies in the Member Countries

7th Meeting of the Tourism Working Group was held on 4 February 2016 with the theme of “Muslim Friendly Tourism: Understanding the Demand and Supply Sides in the OIC Member Countries”. The Tourism Working Group provided the opportunity to thoroughly discuss the main concepts and the general overview of Muslim-friendly tourism from a policy perspective. In line with the recommendations of the analytical study, as well as the responses of the Member Countries to the policy questions that were circulated before the Meeting, the Working Group put forward the following policy recommendations:

- Developing basic guidelines for improving the basic MFT-related services.
- Increasing awareness about the MFT market among the travel industry stakeholders through standardizing terminology used in MFT, introducing market awareness and customer service training programs and utilizing social media for promotion and marketing.

Similarly, the policy recommendations of the 8th Meeting of the Tourism Working Group on “Muslim Friendly Tourism (MFT): Developing and Marketing MFT Products and Services in the OIC Countries” was submitted to the 32nd Session of the COMCEC held on 21-24 November 2016 in İstanbul. Following policy recommendations were suggested as the out outcome of the meetings, discussions as well as the analytical studies:

- Developing a national Muslim Friendly Tourism strategy that links to the country’s overall tourism goals through focusing on building stakeholder awareness, establishing a dedicated MFT body/committee and developing a national MFT products/services and marketing development strategy.
- Conducting government-led MFT-focused destination marketing through developing an MFT branding and positioning for the benefit of local service providers and measuring the potential of a destination for MFT by funding/organizing short-term campaigns.
- Supporting SMEs through developing training and mentorship programs.
- Developing bilateral tourism cooperation within the OIC through technical knowledge exchange and joint promotion efforts for MFT destinations.

The 9th Meeting of the Tourism Working Group on “Muslim Friendly Tourism (MFT): Regulating Accommodation Establishments in the OIC Member Countries.” After the analytical report was presented, member countries, representatives of international organizations and private sector also shared their experiences. Various policy recommendations were suggested based on the discussion:

- Definition and standardization of certification of MFT facilities along the tourism industry.
- Developing a MFT strategy at the destination and offering incentives for MFT services and investments.
- Improving international cooperation on MFT certification on different requirements of MFT standards and appointing an authority responsible for MFT certification both at national and international levels.

The 10th Meeting of the COMCEC Tourism Working Group was held on September 21st, 2017 in Ankara, Turkey with the theme of “Risk and Crisis Management in Tourism Sector: Recovery from Crisis in the OIC Member Countries”. The Meeting has considered the Studies "Risk and Crises Management in Tourism in the OIC Member Countries" commissioned by the COMCEC Coordination Office and the "COMCEC Tourism Outlook 2017" prepared by the COMCEC Coordination Office. Following policy recommendations were suggested as the out outcome of the meetings, discussions as well as the analytical studies:

- Recognizing and identifying threats and risks, planning scenarios for each of the likely threats, establishing crises management processes and recovery task force during pre-crises periods.
- Preparing national crises management strategies and contingency plans and communicate these with the tourism industry stakeholders.
- Diversifying products and market portfolio in order to expand the portfolio and target less sensitive markets.

The 11th Meeting of the COMCEC Tourism Working Group was held on February 15th, 2018 in Ankara, Turkey with the theme of “Destination Development and Institutionalization

Strategies in the OIC Member Countries". The Representatives of the Member States have shared their experiences, achievements and challenges regarding destination development in their respective countries. The Meeting has considered report on "Destination Development and Institutionalization Strategies in the OIC Member Countries" commissioned by the COMCEC Coordination Office. The policy recommendations offered after the meeting were as follows;

- Decentralization in destination management, empowering local structures and governance.
- Involving stakeholders including local governments, tourism industry, NGOs and public into destination planning and creating a shared vision of the destination.
- Improving private sector involvement in destination management, enhancing effectiveness and transparency of DMOs, diversifying their funding sources including membership fees and commercial income besides the public funding.

The 12th Meeting of the COMCEC Tourism Working Group was held on September 13th, 2018 in Ankara, Turkey with the theme of "Destination Marketing Strategies in the OIC Member Countries". The Representatives of the Member States have shared their experiences, achievements and challenges regarding destination marketing in their respective countries. The Meeting has considered the Studies "Destination Marketing Strategies in the OIC Member Countries" commissioned by the COMCEC Coordination Office. After the full day deliberations the Workgroup offered the following policy recommendations;

- Establishing / Empowering a central body (i.e. DMO, CVB) to be responsible for marketing efforts at the destination level
- Managing and regulating existing distribution channels and creation of new distribution channels to prevent dependency and minimize power asymmetry.
- Collecting, storing, analyzing and dissemination of market data; visitor characteristics, seasonality, distribution channel performance, source markets, trends and so on.

The 13th Meeting of the COMCEC Tourism Working Group was held on February 13rd, 2019 in Ankara, Turkey with the theme of "Sustainable Destination Management Strategies in the OIC Member Countries". The Meeting involved a presentation of the OIC Tourism Outlook and the report on "Sustainable Destination Management Strategies in the OIC Member Countries" commissioned by the COMCEC Coordination Office. Following policy recommendations were suggested as the outcome of the meetings, discussions as well as the analytical studies:

- Facilitate stakeholder engagement at the destination level and encourage tourism businesses' sustainable tourism efforts.
- Improve community participation by minimizing leakages from local economy, conduct media campaigns to increase local community involvement as well as tourist awareness of tourism sustainability.
- Establish KPIs for sustainable tourism development based on international standards and climate change agreements.

Another instrument envisaged by the COMCEC Strategy that will strengthen tourism cooperation among member states is the COMCEC Project Funding. The Strategy has a viable funding mechanism through which member countries registered to the Tourism Working Group

submit projects to be financed through grants by the COMCEC Coordination Office. The first project call was made in September 2013. Within the framework of the 1st project call under the COMCEC Project Funding, 2 projects in tourism sector were successfully implemented in 2014. One of them was “Cities of Common Cultural Heritage” project implemented by Azerbaijan Ministry of Culture and Tourism. There were 3 partner countries namely; Turkey, Uzbekistan and Kazakhstan in this project. The project aimed at creating a joint cultural tourism product and at the end of the project with the help of the analytical study prepared as an outcome of the project, cultural heritage routes were created. The other project was “Improving Statistical Capacities of Tourism Sector in COMCEC Mediterranean and Gulf Region” proposed by SESRIC. The project covered 6 member countries namely; United Arab Emirates, Jordan, Tunisia, Albania, Qatar, Oman. This project aimed at improving statistical capacities of the member countries in tourism field and entailed 8 training programs and one workshop in this respect.

The second project call under the PCM was made in September 2014. In this regard, within the scope of the 2nd Project Call, the project titled “Strengthening Community Resilience through eco-tourism”, proposed by The Gambia, was implemented in 2015 with two project partners, namely Senegal and Guinea-Bissau. Under this project, study visits to ten villages were conducted. Moreover, Ecovillage Design Education Programs were held with the participation of 35 residents from these villages. At the end of this project, an Ecovillage Design Education Report was prepared.

The Third Project Call was made in September 2015. In this framework, the following two projects was implemented in 2016:

- Short course on strategies in enhancing the tourism workforce in community-based tourism within the OIC Member Countries (proposed by Malaysia).
- Enhancing the capacity of craft producers in the OIC Member Countries (proposed by the Gambia).

Since than several other tourism related projects such as “Improving Human Capacity on Muslim Friendly Tourism for Regulating Accommodation Establishments in the OIC Member Countries” by Mozambique; “Study on Effective Strategies to Establish Sustainable Muslim Friendly Tourism Parks in Selected OIC Member Countries” by Iran; “Destination Management Organization: Conceptual Framework for Azerbaijan, Cameroon and Iran” by Azerbaijan; “Developing Muslim-Friendly Tourism in Guyana and Suriname” by ICDT; “Capacity Building on Destination Management Organizations of OIC Member Countries” by Mali; Training of Accommodation Providers in the OIC Member Countries on Muslim Friendly Tourism Standards and Quality Service Provision” by Gambia.

The COMCEC Coordination Office made the seventh call for project proposals with a deadline in September 2019. More detailed information on the COMCEC Project Funding mechanism can be reached through the COMCEC PCM Website: (pcm.comcec.org).

7 Conclusion

Tourism industry has enjoyed continued expansion and diversification, becoming one of the most rapidly developing industries in the world. Tourism has evolved into a global phenomenon – one of the most important economic sectors and social activities of the time.

Tourism continues to be an important economic sector capable of attracting foreign direct investments and supporting sustainable economic development, the production of fairly distributed wealth, the creation of employment opportunities and poverty alleviation, particularly in developing countries and the Least Developed Countries.

According to the UNWTO statistics, 1.401 million international tourists travelled in 2018 with an average annual increase of over 4% since the year 2000. Tourism sector which already accounts for 10 percent of World GDP is an important source of employment and foreign exchange that should be supported by governments around the world as part of the policies for stimulating economic growth.

From the period 1980 to 2018, international tourism receipts—which are the export value of tourism, excluding international passenger transport—increased from US\$125 billion in 1980 to US\$ 1,451 billion in 2018 (UNWTO, 2019a) denoting a solid increase in four decades. In real terms, this corresponds to an average growth of 4 percent a year, which has almost the same pace as tourist arrivals.

The sector faces some challenges every year and 2019 is likely to be no different. Three main factors influenced tourism flows in 2017 and 2018; the exchange rate fluctuations, interest rates race to the bottom, the decline in the price of oil and other commodities which increased disposable income in importing countries, as well as increased global concern about safety and security (UNWTO, 2018a). Trade Wars, Brexit and the fall of Thomas Cook had also major impacts on tourism industry.

However, the growth in tourism sector will continue at a stronger rate than last year, with the total contribution to GDP expected to increase by 4-5% in 2019. This growth will require OIC Member Countries to adopt a concerted and coordinated approach to planning and development within the industry, governments and educational institutions to ensure that they fulfill their potential in the future.

Considering the modest share of the OIC Member Countries in international tourism market, it is evident that the inherent potential has not yet been fully realized and manifested itself in desirable levels. Despite 10% annual increase in 2017 and 2018, for 2018 OIC received only 10% of tourism receipts and around 15% of arrivals. OIC Member States need to understand how they can strengthen the position of their tourism industry in response to current global economic challenges and remain competitive among emerging destinations, within a sustainable development perspective.

As in the case of OIC tourist arrivals, tourism receipts in the Member Countries are concentrated in a small number of countries, almost the same countries of the main OIC tourist destinations.

The share of international tourism receipts in the total exports of each member country indicates that tourism plays a significant role in the economies of member countries and constitutes an important source of foreign exchange earnings.

By the groupings in the OIC Member Countries, it is observed that OIC-MENA has experienced expansion in tourist arrivals for the period 2004-2018 particularly during 2018 OIC-Mena recorded a 21% growth. In the same period, OIC-ASIA has experienced a slight decrease in tourist arrivals. OIC- Sub Saharan Africa on the other hand continued its stable growth. In terms of tourism receipts, both OIC-MENA and OIC-Asia increased their tourism income whereas there was a slight decrease in OIC- Sub Saharan Africa's receipts in 2018.

In 2015, it was estimated that there were 117 million Muslim international travelers. This is projected to grow to 168 million by 2020, where the travel expenditure by Muslim travelers is expected to exceed USD 200 billion (CrescentRating, 2016). The COMCEC Tourism Working Group has also explored Muslim Friendly Tourism (MFT) potential in its three consecutive meetings. The 7th Tourism Working Group was held on February 4th, 2016, with the theme of *"Muslim Friendly Tourism (MFT): Understanding the Demand and Supply Side in the OIC Member Countries."* A research report was prepared on the theme of the meeting, which mainly focused on creating awareness about MFT as well as the developments regarding the demand and supply side of MFT in the Member Countries. This report, as well as the Member Country representatives during the 7th Working Group Meeting highlighted some major challenges faced by the member countries. In addition to the demand and supply sides of MFT, COMCEC analyzed product development and marketing aspects of MFT products and services and developing regulations for accommodation establishments to improve MFT among OIC member states. These were covered during the 8th and 9th Tourism Working Group Meetings.

Safety and security concerns are in the spotlight for OIC member states. COMCEC looked into risk and crises management issues in 2017. Governments should work hard to ensure the safety of tourists and to minimize the impact of security threats. Incidents like the sector observed in 2015 and 2016 should need careful planning and management. These will all be tackled during the 10th Tourism Working Group Meeting in September, 2017. Destinations are amalgam of services and products that tourists consume as a whole. It is evident that if properly planned and managed tourism cooperation could play a significant role in the socio-economic development of the Member Countries. COMCEC is also looking into destination planning, management and marketing issues from 2018 onwards. The governance of destinations has been covered during the 11th meeting and their marketing role will be covered in September, 2018 during the 12th Tourism Working Group Meeting in Ankara. The sustainability of destinations and creating a balance between the needs of the industry, the environment and locals were covered during the 13th meeting in Feb. 2019. The 14th meeting to be held on 31st Oct. 2019 will focus on creating, marketing and managing multi-destination tourism corridors in OIC.

The strength of the US dollar relative to other currencies is shifting the price competitiveness among destinations and improving accessibility, developments in technology and e-commerce will also affect market share and rankings of destinations. Obstacles faced in tourism development are diverse in the Member Countries as each country has its own tourism features, level of development and national development priorities and policies. The challenges affecting

tourism performance in the Member Countries ranges from, among others, insufficient tourism-related infrastructure and investments, unskilled tourism workforce to low-capacity tourism administrations and problems in safety and security.

The COMCEC Strategy, provides a useful strategic framework for tourism development and tourism cooperation in the Member Countries with its new implementation instruments, namely, Tourism Working Group and Project Cycle Management mechanism.

To stimulate and promote tourism for economic growth, social progress and environmental sustainability, Member Countries should give priority to tourism sector in their national policies, foster competitive and responsible business models and practices in tourism, increase cooperation between the public and private sectors and enhance international cooperation including cooperation with the member countries.

APPENDIX:

Table 1: Tourist Arrivals in the OIC Member Countries (2009-2018)

UNWTO TOURIST ARRIVALS - OIC	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
World (Millions)	894	952	995	1.035	1.087	1.134	1.186	1.235	1.329	1.401
Afghanistan										
Albania	1.792	2.417	2.932	3.156	2.857	3.341	3.784	4.070	4.643	5.340
Algeria	1.912	2.070	2.395	2.634	2.733	2.301	1.710	-	2.451	
Azerbaijan	1.005	1.963	2.239	1.986	2.130	2.160	1.922	2.045	2.454	2.606
Bahrain	-	955	-	1.014	1.069	838	-	-	4.372	
Bangladesh	267	303	-	125	148	125	-	-	1026	1026
Benin	190	199	209	220	231	242	218	-	281	295
Brunei Darussalam	157	214	242	209	225	201	-	219	219	278
Burkina Faso	269	274	238	237	218	191	-	-	143	144
Cameroon	498	573	604	812	912	-	-	-		
Chad	70	71	77	86	100	122	-	-	87	
Comoros	11	15	19	-	-	-	-	-	28	36
Cote d'Ivoire	-	252	270	289	380	471	-	-	1800	1965
Djibouti	-	51	-	60	63	-	-	-		
Egypt	11.914	14.051	9.497	11.196	9.174	9.628	9.139	5.258	8.292	11.346
Gabon	186	-	-	-	-	-	-	-	186	
Gambia	142	91	106	157	171	156	-	-	162	
Guinea	-	12	-	96	56	33	35	-		
Guinea-Bissau	-	22	-	-	36	36	44	-		
Guyana	141	150	157	177	200	206	207	235	247	287
Indonesia	6.324	7.003	7.650	8.044	8.802	9.435	10.408	12.948	13.396	
Iran	-	2.938	3.354	3.834	4.769	4.967	5.237	-	4.867	7.295
Iraq	1.262	1.518	-	1.111	892	-	-	-		
Jordan	3.789	4.207	3.960	4.162	3.945	3.990	3.763	3.858	3.844	4.150
Kazakhstan	3.118	3.393	4.093	4.807	4.926	4.560	-	-		
Kuwait	297	207	269	300	307	198	-	-		
Kyrgyz Republic	2.147	1.316	3.114	2.406	3.076	2.849	-	-	4568	
Lebanon	1.844	2.168	1.655	1.366	1.274	1.355	1.518	1.688	1857	1964
Libya	-	-	-	-	-	-	-	-	34	
Malaysia	23.646	24.577	24.714	25.033	25.715	27.437	25.721	26.800	26757	25832
Maldives	65	792	931	958	1.125	1.205	1.234	1.286	1390	1484
Mali	160	169	160	134	142	168	-	-	193	203
Mauritania	-	-	-	-	-	-	-	-		
Morocco	8.341	9.288	9.342	9.375	10.046	10.283	10.177	10.332	11.349	12.289
Mozambique	1.461	1.718	1.902	2.113	1.886	1.661	1552	1639	1447	
Niger	66	74	82	94	123	135	135	-	164	157
Nigeria	1.414	1.555	715	486	600	-	-	-		
Oman	1.524	1.446	1.343	1.438	1.392	1.519	-	-	2.372	
Pakistan	855	907	1.161	966	565	565	-	-		
Palestine	396	522	449	490	545	556	432	400	503	606
Qatar	1.659	1.519	2.527	2.346	2.611	2.826	2.930	2.906	2.256	1.819
Saudi Arabia	10.897	10.850	17.498	14.276	15.772	18.260	17.994	18.049	16.109	15.293
Senegal	810	900	1.001	962	1.063	836	-	-	1.365	
Sierra Leone	37	39	52	60	81	44	24	54	51	57
Somalia	-	-	-	-	-	-	-	-		
Sudan	420	495	536	575	591	684	-	-	813	
Suriname	150	204	220	240	249	252	228	257	278	
Syria	6.092	8.546	5.070	-	-	-	-	-	8546	
Tajikistan	-	160	-	244	208	213	414	-	1250	
Togo	150	202	300	235	327	282	273	-	514	573
Tunisia	6.901	7.828	4.782	5.950	7.352	7.163	5.163	5.724	7052	8299
Turkey	25506	31.364	34.654	35.698	37.795	39.811	39.478	31.365	37601	45768
Turkmenistan	-	-	-	-	-	-	-	-		
UAE (Dubai)	6.812	7.432	8.129	8.977	9.990	-	-	14.910	15790	15920
Uganda	807	946	1.151	1.197	1.206	1.266	-	-	1402	1850
Uzbekistan	1.298	1.327	1.460	-	1.969	-	-	-		
Yemen	434	1.025	829	874	990	-	-	-		

Source: UNWTO Tourism Highlights 2006, 2017 and 2019 Editions.

Table 2: Tourism Receipts in the OIC Member Countries (2009-2018) (US \$ Millions)

UNWTO Tourism Receipts (US \$ Billion)	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
World	853	928	1.030	1.075	1.159	1.309	1.260	1.220	1.332	1.451
Afghanistan	-	55	71	56	56	-	-	-	-	-
Albania	1.816	1.626	1.628	1.464	1.473	1.705	1.500	4.070	1.929	2.193
Algeria	267	219	209	217	250	258	-	1710	141	-
Azerbaijan	353	621	1.287	2.433	2.365	2.432	2.309	2.045	3.012	2.634
Bahrain	1.118	1.362	1.035	1.051	1165	1197	-	1200	3642	-
Bangladesh	70	81	87	105	129	153	148	125	337	353
Benin	131	133	187	170	189	151	-	267	150	-
Brunei Darussalam	254	-	-	92	96	79	-	219	177	190
Burkina Faso	64	72	133	84	153	135	-	163	117	-
Cameroon	270	159	409	349	576	-	-	912	524	-
Chad	-	-	-	-	-	-	-	-	-	-
Comoros	32	35	44	39	49	51	-	-	-	-
Cote d'Ivoire	151	201	141	172	181	184	-	1441	396	-
Djibouti	16	18	19	21	22	21	-	63	35	-
Egypt	10.755	12.528	8.707	9.940	6.047	7.208	6.065	5.258	7.775	11.615
Gabon	-	-	-	-	-	-	-	186	186	186
Gambia	63	74	83	88	-	-	-	135	103	-
Guinea	3	2	2	1	-	-	-	35	16	-
Guinea-Bissau	-	13	-	7	17	21	-	44	16	-
Guyana	35	80	95	64	77	79	65	-	-	-
Indonesia	5.598	6.957	7.952	8.325	9.119	10.261	10.761	9963	13139	14110
Iran	2.012	2.438	2.381	1.114	3.076	3.483	-	4.942	4.402	4.402
Iraq	-	1.660	1.543	1.634	-	-	-	892	2959	1986
Jordan	2.911	3.585	3.425	4.061	4.117	4.375	4.065	3.858	4.639	5.249
Kazakhstan	963	1.005	1.209	1.347	1.522	1.467	1.625	4560	2135	2255
Kuwait	354	290	319	425	298	369	499	182	313	395
Kyrgyz Republic	459	284	640	698	530	423	426	3051	429	433
Lebanon	6.744	7.861	6.545	6.327	6.492	6.523	6.857	1.688	7.611	8.400
Libya	50	60	-	-	-	-	-	-	-	-
Malaysia	15.772	18.276	18.259	20.250	21.496	22.595	17.597	26.757	18.323	19.143
Maldives	608	1.713	1.868	1.951	2.333	2.696	2.567	1.286	2.744	3.028
Mali	192	283	267	142	178	212	-	159	206	-
Mauritania	-	-	-	48	41	37	29	-	23	-
Morocco	6.557	6.703	7.281	6.703	6.854	7.056	6.003	10.332	7.442	7.775
Mozambique	196	197	231	250	199	207	193	1.639	151	242
Niger	66	105	96	50	58	90	-	135	83	-
Nigeria	602	576	628	559	542	543	404	1255	2549	1962
Oman	689	780	996	1.095	1.295	1.376	1.540	1897	1748	-
Pakistan	272	305	373	339	288	283	315	965	352	390
Palestine	410	667	795	581	789	603	-	400	225	245
Qatar	179	584	1.170	2.857	3.456	4.591	5.035	2.906	5.971	5.565
Saudi Arabia	5.995	6.712	8.459	7.432	7.651	8.238	10.130	18.049	12.056	12.038
Senegal	463	453	468	407	439	423	-	1007	419	-
Sierra Leone	25	26	44	42	66	35	23	54	83	-
Somalia	-	-	-	-	-	-	-	-	-	-
Sudan	299	94	185	772	773	967	949	741	1029	1043
Suriname	64	61	61	71	84	95	88	257	46	56
Syria	3757	6190	1753	-	-	-	-	-	-	-
Tajikistan**	20	32	-	-	-	-	-	414	8	9
Togo	68	66	79	111	125	125	-	273	138	-
Tunisia	2.773	2.645	1.914	2.227	2.191	2.359	1.354	5.724	1.305	1.713
Turkey	21.250	22.585	25.054	25.653	27.997	29.552	26.616	31.365	22.478	25.220
Turkmenistan	-	-	-	-	-	-	-	-	-	-
UAE	7.352	8.577	9.204	10.380	11.564	13.969	16.038	14.910	21.048	21.375
Uganda	667	784	960	1.135	1.334	791	1.149	1303	937	1027
Uzbekistan	99	121	-	-	-	-	-	1969	689	1144
Yemen	486	1.161	780	849	940	1.026	-	-	-	-

Source: UNWTO Tourism Highlights 2006, 2009 and 2019 Editions.

Table 3: Travel & Tourism Economic Impact for OIC Member Countries (2017 Data)

COMCEC	The direct contribution of Travel & Tourism to GDP %	The direct contribution of Travel & Tourism to Employment (jobs) %	Total contribution of Travel & Tourism to Employment (jobs) %
Afghanistan			
Albania	8.5	7.7	24.1
Algeria	3.3	2.8	6.0
Azerbaijan	4.2	3.8	13.2
Bahrain	4.2	4.0	9.4
Bangladesh	2.2	1.8	3.8
Benin	2.2	1.8	4.8
Brunei Darussalam			
Burkina Faso	1.6	1.4	3.3
Cameroon	3.2	2.6	6.0
Chad	1.3	0.9	3.5
Comoros	4.4	3.7	8.4
Cote d'Ivoire			
Djibouti			
Egypt	5.6	3.9	8.5
Gabon	1.0	0.9	2.6
Gambia	8.2	6.7	17.2
Guinea	2.5	1.9	4.3
Guinea-Bissau			
Guyana	2.6	2.9	7.4
Indonesia	1.9	3.7	10.0
Iran	2.8	2.1	6.1
Iraq	3.0	2.1	6.7
Jordan	5.0	7.3	19.2
Kazakhstan	1.9	2.1	5.9
Kuwait	2.8	2.6	5.5
Kyrgyz Republic	1.4	1.4	3.7
Lebanon	6.5	6.4	17.9
Libya	2.5	2.0	5.0
Malaysia	4.8	4.6	11.8
Maldives	39.6	16.0	37.4
Mali	3.8	2.1	5.8
Mauritania			
Morocco	8.2	7.1	16.4
Mozambique	3.4	2.8	7.9
Niger	2.1	1.7	4.2
Nigeria	1.9	1.8	4.8
Oman	3.2	3.4	6.6
Pakistan	2.9	2.5	6.5
Palestine			
Qatar	3.3	4.9	9.2
Saudi Arabia	3.4	5.3	9.1
Senegal	4.5	3.8	9.1
Sierra Leone	1.7	1.5	3.7
Somalia			
Sudan	2.3	1.7	4.3
Suriname	1.2	1.2	2.5
Syria	6.2	3.6	8.9
Tajikistan	3.2	2.9	7.7
Togo	4.1	3.3	7.4
Tunisia	6.9	6.3	13.0
Turkey	3.8	1.6	7.4
Turkmenistan			
Uganda	2.9	2.4	6.3
United Arab Emirates	5.1	4.9	9.5
Uzbekistan	0.9	0.8	2.4
Yemen	2.3	1.2	3.3

Source: WTTC, Travel & Tourism Economic Impact 2018, Country Reports, 2017

Table 4: Classification of the OIC Member Countries by Region

OIC-Sub Saharan Africa		OIC-MENA		OIC-Asia	
1.	Burkina Faso	1.	Egypt	1.	Guyana
2.	Somalia	2.	Jordan	2.	Pakistan
3.	Nigeria	3.	Iran	3.	Afghanistan
4.	Mauritania	4.	Bahrain	4.	Kyrgyz Republic
5.	Benin	5.	Morocco	5.	Malaysia
6.	Cameroon	6.	Saudi Arabia	6.	Bangladesh
7.	Chad	7.	Libya	7.	Azerbaijan
8.	Cote d'Ivoire	8.	Algeria	8.	Indonesia
9.	Djibouti	9.	Albania	9.	Kazakhstan
10.	Gabon	10.	Iraq	10.	Maldives
11.	Guinea	11.	Lebanon	11.	Tajikistan
12.	Guinea-Bissau	12.	Tunisia	12.	Turkmenistan
13.	Mali	13.	Turkey	13.	Uzbekistan
14.	Mozambique	14.	Yemen	14.	Brunei Darussalam
15.	Niger	15.	Qatar		
16.	Senegal	16.	Oman		
17.	Sierra Leone	17.	Kuwait		
18.	The Gambia	18.	Palestine		
19.	Sudan	19.	United Arab Emirates		
20.	Suriname				
21.	Togo				
22.	Uganda				
23.	Comoros				

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